



KACE

K1000 Management Appliance Asset Management Guide

Release 5.2

© 2004-2011 Dell, Inc. All rights reserved.

Information concerning third-party copyrights and agreements, hardware and software warranty, hardware replacement, product returns, technical support terms and product licensing is in the KACE End User License agreement accessible at:

http://www.kace.com/license/standard_eula

Revision Date: January 28, 2011

Contents

- 1: Asset Management Quick Start 1
 - Configuring Software License Compliance 1
 - Creating software associations 1
 - To create a software Smart Label 1
 - To create a software asset 2
 - Adding license assets 3
 - To add a license asset 3
 - To import license assets 4
 - Customizing the License Asset Type 5
 - To customize the license asset type 5
 - What's Next 5

- 2: Tracking Assets with Asset Management 7
 - About Assets 7
 - Advantages to tracking assets 8
 - Working with Different Asset Types. 8
 - About physical assets 9
 - How Asset and Inventory information differ 10
 - About logical assets 11
 - Deciding what assets to track 12
 - Importing Asset Data 13
 - To Prepare Source Data 13
 - To Import Source Data 13

- 3: Doing More with Asset Management 15
 - Ongoing Benefits with Asset Management 15
 - Changing an Existing Asset Type 15
 - About customizing fields 15
 - Changing an existing field 16
 - Deleting a field 16
 - Customizing the computer asset type 16
 - To edit the computer asset type 17
 - Editing an asset type to create a relationship 18
 - To edit the location asset type 18
 - To add the parent relationship to your location assets 18
 - Creating a Custom Asset Type 19
 - To create a physical asset type 19
 - Deleting asset types. 20
 - Metering Software Usage 20
 - Adding, editing, or deleting a software meter. 21
 - To add a software meter 21
 - To view software metering results 21
 - To edit a software meter 21
 - To delete a Software Meter 22
 - To configure and deploy Software Metering 22
 - Threshold settings for license compliance. 23

- To configure license usage warning thresholds 24
- Administering Asset Management 24
 - Scheduling regular imports 24
 - Using asset data in reports 24
 - Creating an asset administrator role 25

Asset Management Quick Start

This chapter describes the basic steps in setting up software license compliance with the Dell KACE K1000 Management Appliance Asset Management component. See [Chapter 2: Tracking Assets with Asset Management](#), starting on page 7, for an overview of Asset Management.

Configuring Software License Compliance

The first example shows using assets to track software license compliance, which is one of the most commonly used Asset Management capabilities. Asset Management can tell you:

- If your organization's computers and devices are running more copies of a program than you have licenses for.
- If you have unused licenses.

The major areas of setting up software license compliance are:

- [Creating software associations](#), on page 1
- [Adding license assets](#), on page 3

The Dell KACE K1000 Management Appliance counts multiple software license assets on a single machine as a single seat. For example, if your license allows you to use Adobe Acrobat, and a computer has two different versions of point releases of Adobe Acrobat installed, the appliance counts this as one seat.

Creating software associations

Initially, creating a license asset requires some preparation.

To create a software Smart Label

If you want to group several software titles and/or releases together under the same label:

1. Click **Inventory > Software**.
2. Click **Create Smart Label** (on the far right side of the screen).
3. Select the fields you want to search and whether you want to match or not match the text that you enter.

For example, the following criteria find Microsoft Office Professional, but eliminate Microsoft Office Proof from the search.

Create Smart Label

To create a smart label, simply enter the search criteria and select the label:

[and/or]	Display Name (Title)	contains	Office Pro
AND	Display Name (Title)	does not contain	proof

You can create a Smart Label with up to four criteria. If you want more criteria, use SQL or contact Dell KACE support for assistance.

- In the text field, enter the software label that you want to associate this search with, for example, **Office-pro**.
- Click **Test Smart Label**.

View the list of software titles below the yellow area to see which match your criteria. You might need to change, add, or delete criteria depending on the specific versions of Microsoft Office you have installed or plan to install.

- If the results are what you expect, click **Create Smart Label**.

Once saved, the Smart Label is now live. Current software titles and titles purchased in the future that match these criteria automatically receive the **Office-pro** label—in addition to any other labels you might assign those titles.

For more information about using Smart Labels and Inventory, see the *Administrator Guide*.

To create a software asset

Depending on how you set up your software assets and Smart Labels, the appliance counts multiple software titles on a single machine as a single seat. For example, you include all 1.x releases of a program in a single Smart Label. If the appliance finds a 1.1 and a 1.2 instance of the program on one node, the appliance counts them as one seat.

- Click **Asset > Assets**.
- In the **Choose Action** menu, click **Add New > Software** to create a new software asset.
- Fill in the software asset fields.

Assets are configurable, so your list of fields may differ. (Only the entries required for this example are described.)

- For **Name**, enter a name for the license asset: *Office Pro SW Asset*
- Leave the **Software** field unassigned.
- For **Software Label**, pick the **Office-pro** label from the **Select label...** drop-down menu.

If you don't see the **Office-pro** label in the list, filter the list of visible labels by entering some characters from the label name in the **Filter** field to the right of **Select label**.

- Click **Save** to complete creation of the software asset.

After saving, a list of all existing software assets is displayed. If your appliance is new, your software asset may be the only one.

These steps associate the software asset with the Smart Label you created earlier.

It is not strictly necessary to create a Smart Label for license compliance. However, a Smart Label can help make sure that you catch all relevant software titles in a long list of software titles. Also, the right criteria add related titles that you don't yet own to the software asset.

Adding license assets

The last step in drawing all of the compliance data together for reporting is to create one or more license assets.

You need to know these details for each license:

- The software titles covered by the license.
- The number of installations allowed by the license.

To add a license asset

1. Go to the **Asset > Assets** page.
2. In the **Choose Action** menu, click **Add New > License** to create a new license asset.

The **Asset Detail** page starts with three fields, which are already completed. You can modify or delete the rest of the fields to match the needs of your organization.

3. In the **Name** field, enter a name for the license. For example: **Office Professional PO #1234**

This is the name that you use for to find the asset. If you plan to have multiple licenses associated with each software title, using a purchase order number or purchase date in the name is a good idea.

4. For **License Count**, enter the number of installations the license allows. For this example, enter **5**.
5. In the **Applies to Software** menu, click **Office Pro SW Asset**.
6. For **License Mode**, select the appropriate type.
7. In the **Purchase Order** field, enter: **1234**.
8. In the **Purchase Date** field, enter today's date.
9. Click **Save** on the bottom of the page.

The **Asset > Assets** tab reappears with the new asset. The number of **License Count** appears does not change until you buy more licenses and update Assets. However, the **Installed** number changes as agents check in to the appliance.

You created a license asset for a specific purchase, associating all of the licenses with the software asset you created. With this method, the software asset shows your total license count and usage while each individual license shows you how many licenses were purchased at each time.

To import license assets

Use this feature to add large amounts of existing data to the appliance.

If you don't have a csv file, create one now. In the future, you can use the Excel or csv text files your organization creates.

To create a csv file

1. For this exercise, create a simple comma separated value (csv) file.

In regular use, start with the spreadsheets that your company creates to track equipment, software, and other items considered important instead of making a csv file.

If you have Excel, you can create the csv file with it. (If you use Excel, omit the commas from the file's contents.)

- a. In a text editor, type the header line:

Name,Seats,Software,Vendor,PO #,Purchase Date

- b. Type a body line below the header line:

PO#1114,2,Office Pro SW Asset,CDW,1114,3/1/2009

- c. Type a second body line below the first body line.

PO#1175,3,Office Pro SW Asset,CDW,1175,3/25/2009

- d. Save the file with a .csv suffix.

1. In Asset Management, go to the **Asset > Asset Import** page.
2. In the **KACE Asset Import Wizard - Upload File** page, click **Browse** and go to the location of the file.
3. Click the check box for **File Includes Header Row** and **Next**.
4. On the **KACE Asset Import Wizard - Asset Type Selection** page, select the **License Asset** type and **Next**.
5. Map the fields with your spreadsheet:
 - a. For **Asset Name**, select **Name**.
 - b. For **License Count**, select **Count**.
 - c. For **Applies to Software**, select **Software**.
 - d. For **Vendor**, select **Vendor**.
 - e. For **Purchase Order #**, select PO # from the CSV fields list and select the **PK** check-box.

Selecting PK (primary key) identifies which field to check to avoid duplicating when you import.

You can select a new primary key each time you import.

- f. For **Purchase Date**, select Purchase Date.
6. Click **Preview** to review the data and see if it looks correct.
7. Click **Import Data** to complete the import process.
8. Click **Done** to return to the **Asset > Assets** page.

Customizing the License Asset Type

You can add, change, and delete the fields of an asset type to suit your environment.

To customize the license asset type

1. In Asset Management, go to the **Asset > Asset Types** tab.
2. Click **License**.
The Asset Type Detail page opens.
3. For **License Mode Field**, select **License Mode**.
4. In **Select License Modes to Ignore**, select **Freeware**.
This prevents freeware from being tracked for license compliance.
5. Click the plus symbol **+** on the right side of the page.
This opens a new line below the existing asset types.
6. In the **Name** field, type **Department**.
You can ignore Default and Required.
7. From the **Field Type** drop-down list, select Asset Department.
8. Click **Save** at the end of the row.
9. (Optional) Click the notepad icon at the end of the **License Mode** row.
10. Change the name of the values to match your preferences.
These are the fields that you can select from in the License Mode Field in [step 3](#)
11. Click **Save** at the end of the row.
12. Click **Save** on the bottom of the page.

Adding department to the license asset lets the user track which department requested the license.

For more information about changing asset types, see [Customizing the computer asset type](#), on page 16.

What's Next

The following chapter provides:

- A general overview of assets.
- Instructions for customizing existing assets.
- Instructions for creating new custom assets.
- Help deciding what to include in assets.

Tracking Assets with Asset Management

This chapter describes:

- The benefits of tracking assets.
- The different types of assets that your K1000 Management Appliance can manage.
- An overview of how to create, configure, and use assets to track your organization's resources.
- Step-by-step descriptions of the most common tasks with the Asset Management component.

Software license compliance reporting can be looked at from different angles:

- **Software Assets view** (view by **Asset type** > **Software** under **Asset** > **Assets**):
 - **Installed** is a sum of all computers that are using any of the software titles associated with this asset through the Smart Label.
 - **Total Licenses** is a sum of the number purchased on each associated license.

License Assets view (view by **Asset type** > **License** under **Asset** > **Assets**):

- **Installed** is a sum of all computers that are using any of the software titles associated with the software asset through the Smart Label.
- **License Count** is the total number of seats purchased on a particular license.

About Assets

The Asset Management component has three primary functions:

- **Software license compliance tool.** You can use Assets to track and display the number of software licenses you own—and the number of software copies your organization is actually using. *Inventory by itself can tell you how much you are using, but not how much you are licensed for.*
- **Component life cycle tool.** For example, you can track computers from before they are deployed to after they are retired. You can track whatever you want; many K1000 Management Appliance customers track more expensive peripherals such as printers, network devices, and smart phones.
- **Freeform data tool.** The K1000 Management Appliance Asset Management component is a relational database that you can use to track almost anything important to your organization. For example, you can use Assets to track purchase orders by entering each PO as an asset and linking it to the items purchased, received, and dispersed. You can

also use Assets to establish relationships among physical and logical assets. For example, the relationship between:

- A computer and its major peripherals
- A building, a campus, a city, and region



The Asset Management component helps you determine:

What do I own? Where is it? What is its condition, useful life, and value?

Advantages to tracking assets

The K1000 Management Appliance Asset Management component offers you a flexible system for keeping track of the resources that your organization uses throughout the life of the resource. The Asset Management component offers you the ability to:

- View the present state and history of a resource's use in your organization. For example, not only can you track how many printers you have, you also can more easily track how many are due to go out of warranty and when.
- Track both *physical* (for example, hardware, software, office furniture) and *logical* (for example, department, PO, location) assets. You can create an asset for anything that you want, and create your own custom asset tracking fields to track any aspect of an asset that your organization considers important.
- Create peer-to-peer and parent-child relationships between assets and track them together. This allows you to track an asset you purchased by its PO, location, department, project, or any other characteristic.

The Asset Management component allows you to organize your assets in ways that allow you to see both details about specific assets and overview information about all of your organization's assets. This information helps you:

- Promote financial accountability by giving you the ability to ensure that your organization is adhering to license agreements or other legal requirements.
- Make better decisions about resources. You can see where resources are unused or over assigned.
- Harvest and reuse technology. You can see where you may already have a resource to fill a new need. Or, find out if you can use an asset in a different way.
- Secure your environment against unauthorized applications.
- Leverage contracts and vendor relationships. The Asset Management component capabilities allow you to see the big picture and where you might obtain economies of scale.
- Promote financial accountability. You can figure out the true cost of your resources.

Working with Different Asset Types

There are two main types of assets:

- Physical assets, which generally include items that you purchase and that have a life span, such as software, important peripherals, or company mobile phones.
- Logical items, such as office locations, departments, vendors, and warranties. You use logical assets primarily to provide depth of data about physical assets. (For example, *where* are the assets, or which *department* is using them?)

Your K1000 Management Appliance includes the following default physical asset types:

- Computer
- Software
- License

And the following default logical asset types:

- Cost Center
- Department
- Location
- Vendor

Additionally, you can create an asset to track anything that is important to your organization. You can also create custom asset types. See [Chapter 3: Doing More with Asset Management](#), starting on page 15, for more information.

About physical assets

The Asset Management component and Inventory component automatically share some information about the computers that have K1000 Management Appliance agents installed. Inventory automatically provides Asset Management with information about the hardware and software that checks into K1000 Management Appliance.

This is the default Inventory information for Computer collected by K1000 Management Appliance:

The screenshot shows a web interface with a navigation bar at the top containing tabs: Computers, Software, Processes, Startup, Service, IP Scan, MIA, and Label. The 'Computers' tab is active. Below the navigation bar, the page title is 'Computers : Detail Item "racer"'. There are two links: '[Expand All]' and '[Printer Friendly Version]'. A 'Summary' section follows, containing the following information:

Name:	racer
Model:	MacBookPro1,1 [MacBook Pro (15-inch)]
IP Address:	10.111.9.67
MAC:	00:16:cb:8d:91:2d
RAM Total:	2048 MB
Processors:	Intel Core Duo 2.16 GHz Intel Core Duo 2.16 GHz
OS Name:	Mac OS X 10.4.11 (x86)
Uptime:	6 days, 22 hrs
Agent Version:	5.0.24113

Any additional fields that you add to the **Computer** asset type are also displayed in the **Inventory** page. This is the default **Computer** asset information displayed in **Inventory**:

Asset

Asset Information	
Record Created:	Aug 03 2009 03:14:01 PM
Record Last Modified:	Aug 03 2009 03:14:01 PM
Type:	Computer
Name:	racer
	[Edit this Asset]
Machine:	racer
Related Assets (0)	
Asset History	

How Asset and Inventory information differ

The main differences between the K1000 Management Appliance assets and inventory information are:

- *Inventory* information is automatically generated each time computers check in. Inventory information is a current snapshot of computer use on your network, which is overwritten and deleted each time a computer checks in.
- *Asset data* is static and changes only when you import new data or change it manually. (Computers are an exception to this rule.) Asset history is stored and displayed on your K1000 Management Appliance as a record of how the asset changed. The history information stays with the asset until the asset is deleted.

You can also add information about any type of physical assets. Many customers use the Asset Management component to centralize data they previously tracked in various spreadsheets. Common custom assets are printers, mobile devices (smart phones and pagers), or network devices (routers and switches).

The following example below shows mobile devices stored as assets.

Assets		Mobile Devices			
		+ New Asset		Advanced Se	
Choose action...	Found 4 assets.				
<input type="checkbox"/>	Name ↓	Device Type	Department	User	Carrier
<input type="checkbox"/>	123-45-A789	Palm Pre	Training	Garcia B	Verizon
<input type="checkbox"/>	123-45-A897	Palm Pre	Training	Jones John	Verizon
<input type="checkbox"/>	AB123-45-6789	BlackBerry	Information Technology		T-Mobile
<input type="checkbox"/>	ZYX9876-54321	iPhone	Sales	Smith A	AT&T

The Mobile Devices **Asset Detail** screen shows the examples of the types of fields you can use for keeping track of a physical device:

Asset Detail [Back to Asset Listing](#)

Record Created: Oct 14 2009 04:28:38 PM
 Record Last Modified: Oct 20 2009 01:37:53 PM
 Asset Unique Id: 615
 Type: Mobile Devices

Name: 123-45-A789
 Device Type: Palm Pre
 Department: Training Filter: (6) [Show All](#)
 User: Garcia B Filter: (7) [Show All](#)
 Carrier: Verizon
 Phone Number: 650-555-7777

[Save](#) [Duplicate](#) [Delete](#) [Cancel](#)

Related Assets

Total Number: 0

Asset Name	Type	User

History

Time	Changes
2009-10-20 13:37:53	User changed from 'None' to 'Garcia B'
2009-10-20 13:28:11	Phone Number changed from '408-555-5555' to '650-555-7777'
2009-10-20 13:26:07	Phone Number changed from '' to '408-555-5555'
2009-10-14 16:28:38	Created new Mobile Devices record. Department changed from 'None' to 'Training'

About logical assets

Logical assets include more conceptual entities, such as locations, cost centers, vendors, and departments. Most customers use at least one logical asset. Among other things, logical assets help you:

- Identify and protect physical assets.
- Establish logical relationships that are used in reports (for example, geographical relationships or the relationships of business entities).

You can also add custom logical assets to your database, like support contracts, that allow you to track additional metadata about those objects.

The following example shows the Asset Detail screen for a cost center. This cost center has computers, departments, and printers being linked and tracked as related assets.

Asset Detail

Record Created: Apr 09 2007 08:48:05 AM
 Record Last Modified: Jul 15 2008 02:12:49 PM
 Asset Unique Id: 91
 Type: Cost Center

Name:

Location: Americas
[\[Edit\]](#)

dept: Engineering
[\[Edit\]](#)

Related Assets	
Total Number: 9	
Asset Name	Type
DGH32P81	Computer
SIMAK	Computer
ulysses	Computer
Sales-LA	Department
Sales-NY	Department
88854-1198	Printers
Dion Printetr	Printers
Local 1234	Printers
printer1	Printers

Deciding what assets to track

The Asset Management component's flexibility can make it difficult to decide what asset fields to start with. Consider starting with the equipment and purchasing information that your company already keeps in spreadsheets:

- If this data important enough to track now, it's probably important enough to turn into an asset.
- You can import spreadsheet data directly into the Asset Management component.

To prioritize your work, consider not including freeware and items of relatively minor value.

Importing Asset Data

This section explains how to import the information you have in spreadsheets into Asset Management. Importing CSV (comma separated value) files is the most efficient way to create large quantities of asset data. Before you import large quantities of data:

- Define the basic fields for your asset. Before you start the process of importing assets from CSV files, read through [How Asset and Inventory information differ](#), on page 10.
- Decide what to use for a primary key or keys. That is, the field or combination of fields that makes a reliable unique identifier, which the Dell KACE K1000 Management Appliance can use to determine whether to update an existing record or create a new one.

If the CSV file contains new assets for asset types that you have defined in Dell KACE K1000 Management Appliance, the new assets are automatically added.



As long as you have already defined the asset type, you can import a new asset of that type without manually entering it in the K1000 Management Appliance.

To Prepare Source Data

Discussing the general contents of spreadsheets is beyond the scope of this documentation. However, before importing your source data:

1. Confirm that your spreadsheets are ready to use:
 - Are the equipment names useful? That is, do they help you identify the item?
 - Do the spreadsheets have column headers? CSV files that have header rows are easier to work with. (In the Asset Management user interface, unnamed columns are referred to by column number.)
 - Do all columns have equivalent field types in Asset Imports? For example, you can import specific vendors that don't already exist in the Asset Management component, but you must already have a Vendors field type.
 - Is the data clean? For example, do any columns contain commas within the data (for example, last names and first names)?
2. Save the spreadsheet as a CSV or text file.

To Import Source Data

In this example, software licensing data is imported:

1. Go to the **Asset > Asset Import** page.
2. On the KACE Asset Import Wizard - Upload File page, click **Browse** and go to the location of the file you want to import.
3. If the file's columns have headers, select the check box for **File Includes Header Row and Next**.

If the files columns don't have headers, you need to refer to the columns by number in the procedure.

4. On the **KACE Asset Import Wizard - Asset Type Selection** page, select the license asset type and **Next**.
5. Map the fields. (The exact fields available depend on the contents of your spreadsheet.)
 - a. For **Asset Name**, select Name from the CSV fields list.
 - b. Select the **PK** (primary key).

This means that Asset Management can use **Name** (along with Purchase Order below) to identify this asset in this import and future imports.

You can select a new primary key each time you import.
 - c. For **License Count**, select Count from the CSV fields list.
 - d. For **Applies to Software**, select Software from the CSV fields list.
 - e. For **Vendor**, select Vendor from the CSV fields list.
 - f. For **Purchase Order #**, select PO # from the CSV fields list and select the **PK** check box.
 - g. For **Purchase Date**, select Purchase Date from the CSV fields list.
6. Click **Preview** to see which records will be imported into your K1000 Management Appliance database.
7. Click **Import Data** to complete the import process.
8. Click **Done** to return to the **Asset > Assets** page.

Doing More with Asset Management

The material in this chapter assumes that you are already somewhat familiar with the Asset Management component. This chapter covers:

- Creating logical relationships between assets
- Changing an asset
- Maintaining your asset data

Ongoing Benefits with Asset Management

Once you set up Asset Management, you can:

- Monitor your organization's hardware and software resources.
- Monitor your organization's *logical* assets, such as geographic locations, cost centers, departments, vendors, and so on. These types of assets are normally used as the basis for reporting. For example, to answer questions like "how many computers does this department have?" and "when do the licenses we bought from a software vendor expire?"
- Establish relationships between different assets. These relationships can be peer-to-peer or parent-child (with any number of levels).

Changing an Existing Asset Type

Some asset types might have all the fields you want. Others assets types might be incomplete or you may want to edit the fields. The following section shows how to add a new vendor by creating fields.

About customizing fields

To handle a wide range of asset data, you can choose a list of asset fields to track. You can use the default fields, edit the defaults, or create asset fields.

You can choose a combination of these types of fields:

- Text (such as a phone number or notes)
- Label (such as an asset tag number)
- Single select

- Multiple select
- Attachment (such as an online technical manual or location-specific instructions)
- Date
- User



The field order is important. Only the first five fields of an asset are shown in the Assets summary page

Custom asset fields can also allow you to create relationships between one asset to another; you are establishing links from one record to another at the time of import.

Changing an existing field

When you rename a field, values for that custom field are retained.

Although the K1000 Management Appliance tries to maintain the values, if you change the **Field Type** of a field to a type that doesn't support the data already entered, that data is lost. For example, a text field can convert to note field, but you might lose data if you convert a text field to a number field.

Deleting a field

When you remove the name of a field, values for that custom field are removed from all assets.

Customizing the computer asset type

All standard and custom asset types can be customized with additional fields to track whatever data you need.

Almost all computer asset data, whether displayed in the **Asset** or **Inventory** tabs, originates from the **Asset** tab. You can import computer asset data or change it manually on the Asset tab.

The only computer inventory or asset information that comes from **Inventory** is the data for the **Mapped Inventory Field** and **Matching Asset Field**. The values for those fields are collected each time the computer checks into the K1000 Management Appliance. At check-in time, K1000 Management Appliance probes the **Mapped Inventory Field** and **Matching Asset Field** of the computer and confirms that an asset exists for that combination of data. If not, it creates one.

The default data type for **Mapped Inventory Field** is **System Name** and for **Matching Asset Field** is **Name**. However, if you reimaged your systems, the information under the old system name is lost to Assets. (Some customers use BIOS serial number, IP addresses, MAC Addresses, or something similar.)



If you change the default type, you lose an asset's history prior to that change because K1000 Management Appliance automatically creates new assets with the new information. If you think you might want to change the type, make this decision as early as possible in the process of setting up your K1000.

If you want to use custom fields for this information, you need to first create those fields in the computer asset type.

To edit the computer asset type

The following example procedure adds a few useful fields, including the BIOS serial number and serial number fields, which you need to add before you can use them with the **Mapped Inventory Field** and **Matching Asset Field**.



When the Asset Type is completed, only the first five Asset Field types display.

1. In K1000 Management Appliance, go **Asset > Asset Types**.
2. Select **Computer**.
3. On the **Asset Type Detail** page, click the plus symbol **+** on the right side of the page. This opens a new line below the existing asset fields.
4. Enter **BIOS Serial Number** for the name of the field, and select **Text** for the **Field Type**.
5. Click **Save** at the end of the row.
6. Click the plus symbol to add another field.
7. Enter *Serial Number* for the name of the field, and select **Text** for the **Field Type**. Reserve the **Number Field Type** for fields you perform calculations on. Using the Number Field Type might strip leading zeros in a serial number.
8. Click **Save** at the end of the row.
9. Click the plus symbol to add another field.
10. Enter *Purchase Date* for the name of the field, and select **Text** for the **Field Type**.
11. Click **Save** at the end of the row.
12. Click the plus symbol to add another field.
13. Enter *Location* for the name of the field, and select **Asset Location** for the **Field Type**.
14. Click **Save** at the end of the row.
15. Click **Save** at the bottom of the page.
16. For **Mapped Inventory Field**, change the value to **BIOS Serial Number**.
17. For **Matching Asset Field**, change the value to **Serial Number**.

18. Click **Save** on the bottom of the page.

Editing an asset type to create a relationship

You can add edit asset types to establish relationships that associate and track different assets together. These relationships can be:

- Peer-to-peer, such as printer and computer.
- Parent-child, such as a cost center and the computers associated with it.

The following example shows how to make a parent-child relationship with locations by adding a field to the location asset type.

To edit the location asset type

1. Go to **Asset > Asset Types**.
2. Click the **Location** asset type.
3. On the **Asset Type Detail** page, click the plus symbol **+** on the right side of the page.
This opens a new line below the existing asset fields.
4. Enter *Parent Location* for the name of the field, and select **Parent** for the **Field Type**.
5. Click **Save** at the end of the row.
6. Click **Save** at the bottom of the page.

When you open a **Location** asset, the Parent Relationship field is now part of the **Asset Detail** page.

To add the parent relationship to your location assets

When creating this type of relationship, start with the highest level in the relationship.

1. Go to **Asset > Assets**.
2. (Optional) In the view menu, select **View by Asset Type, Location**.
Restricting the view to only assets of that type is not strictly necessary, but makes things clearer.
3. If the highest level location does not exist, click **Create New Asset**.
If it does exist, skip to [step 6](#)
4. On the **Asset Detail** page, enter the name for the new field.
In this example, *Western Division*.
5. Leave the parent location unassigned, and click **Save**.
6. On the **Asset > Assets** page, if the second level location exists, select it.
7. If the second level asset does not exist, click **Create New Asset**.
If the asset already exists, click to open it on the **Asset Detail** page and skip the next step.

8. On the **Asset Detail** page, enter the name for the new field.
In this example, **San Jose**.
9. For this example, select **Western Division** for the Parent Location, and click **Save**.
10. (Optional) If you have many location assets, enter the first characters in the **Filter** field to limit the choices available in the **Parent Location** field.

11. Click **Save**.

You can continue making as many levels of location assets as you want. For example, some customers might want to have locations for each building on a campus or each rack in a data center.

Creating a Custom Asset Type

The Asset Management component supports making an asset of almost anything. Because the asset management is fully customizable, you can add as many or as few custom asset types as you need in your environment.

If something is important to your organization, consider tracking it in Asset Management.

To create a physical asset type

The following example shows how to create a printer asset, which is a common custom asset type.

1. Go to **Asset > Asset Types**.
2. From the Action Menu, select **Add New Item**.
3. On the **Asset Type Detail** page, for **Name**, enter **Printer**.
4. Click the plus symbol **+** on the right side of the page.
This opens a new line below the existing asset fields.

5. Enter *Brand* for the name of the field, and select required.
6. Skip over Value and select **Single Select** for the **Field Type**.
Single select enforces consistent naming so that the list doesn't include variations like HP, Hewlett Packard, and Hewlett-Packard, for example.
7. Go back to **Value** and enter the brands your organization uses. To make a select list, separate the values with a comma. For example:
Epson, HP, Kyocera, Xerox
8. Click **Save** at the end of the row, and click the plus symbol to add another field.
9. Enter **Serial Number** for the name of the field and select **Text** for the **Field Type**.
10. Click **Save** at the end of the row, and click the plus symbol to add another field.
11. Enter *Location* for the name of the field and select **Asset Location** for the **Field Type**.
12. Click **Save** at the end of the row, and click the plus symbol to add another field.
13. Enter *Department* for the name of the field and select **Asset Department** for the field type.
Depending on your organization, you might want to use **Cost Center** and **Asset Cost Center** for the field type.
14. Click **Save** at the end of the row, and click the plus symbol to add another field.
15. Enter **Warranty Expiration** for the name of the field and select **Date** for the field type.
The format is *yyyy-mm-dd*. The supported range is 1000-01-01 to 9999-12-31.

Deleting asset types

If you click the **Delete** button, the asset type definition and all assets of this type are removed from the system. Any other assets that point to these assets are reset to point to no asset.

Configuring thresholds for compliance

Metering Software Usage

Software Metering supports tracking the actual usage of software titles (as opposed to tracking installations).

Once enabled, Software Metering collects data from the machines you specify (all machines or a subset by label) about when and how often they use specific software applications. Software Metering determines usage by running a script to look for specific software processes on the targeted machines. (For each meter you set up, a script is run every five

minutes.) Metering gives you information about what programs are running on the client computers over time—not what is running at the moment.



In Software Metering, the application name is the process name (for example, as it appears in Windows Task Manager, *iexplorer*) rather than the software title (as it appears in **Add/Remove Programs**)

Also, software that is installed as part of a suite needs to be tracked by individual executables—not by the name of the suite.

Adding, editing, or deleting a software meter

To add a software meter

To start metering the use of specific software:

1. Go to **Asset > Metering**.
2. Select the **Add New Item** option in the **Choose Action** menu.
3. On the **Software Metering : Edit Detail** page, enter the process name or select the process name from the drop down list.
Use the filter on long lists.
4. Select the associated operating system.
5. Select the software asset to associate with this meter.
Use the filter on long lists.
6. (Optional) Enter notes to describe or explain this software meter.
7. (Optional) To view the license asset details, click on the **Licenses** link.
8. Click **Save**, or click **Cancel** to return to the Software Metering listing page.

You can see the results of the new software meter on the Software Metering page and the **Software Metering : Edit Detail** page.

To view software metering results

1. Go to **Asset > Metering**.
The software metering page displays useful information such as the Process Name, Enabled, Installed, Licensed, In Use, and so on.
2. Click a process name.
The **Software Metering: Edit Detail** page appears. The **Usage Detail** table displays information such as **Computer Name**, **Times Launched**, **Minutes Used**, and **Last Used**.

To edit a software meter

Editing a software meter is similar to adding one.

1. Go to **Asset > Metering**.

2. On the **Software Metering** page, select the process name.
3. You can edit the following items on the **Software Metering: Edit Detail** page:

Enabled	Select this check box to enable software metering for a software process.
Process Name	The specified process name to monitor on the agent machine.
Associated Software Asset	Select the related software asset to track usage only on machines with a specific software version deployed.
Notes	Enter any notes that further describe or explain this software meter.

4. Click **Save** to save your changes, or click **Cancel** to return to the **Software Metering** page.

To delete a Software Meter

You can delete a software meter.

1. Select **Asset > Metering**.
2. On the **Software Metering** page, select the software processes whose meters you want to delete.
3. Select **Delete Selected Item(s)** from the **Choose action** drop-down list.
This just deletes the software meters you have selected.
4. Click **Yes** to confirm deleting the software meters or **Cancel**.

To configure and deploy Software Metering

1. Go to **Asset > Metering**.
2. Select the **Configure Settings** option in the **Choose Action** menu.
3. To run metering on target machines, select **Enabled**.
4. (Optional) Select **Run Disconnected** to run metering even when the computer cannot report the results to the K1000 Management Appliance.
The target machine stores the results until the agent reestablishes contact with K1000 Management Appliance. Then the target machine uploads the results.
5. (Optional) Select **While Logged Off** to allow metering to run even if a user is not logged in.
Unless you select this option, the script only runs when a user is logged into the machine.
6. Select among the following **Summary Schedule** options
To avoid impacting performance, schedule metering less frequently than the machine inventory.

Run Every <i>n</i> minutes/hours	Run at a specified interval.
---	------------------------------

Run Every <i>day</i> at HH:MM AM/PM	Run everyday or a specific day of the week at the specified time.
Run on the <i>nth</i> of every month or a specific month at HH:MM AM/PM	Run on a specified date every month or on a specific month at the specified time.
Custom Schedule	<p>Enter a custom schedule. The custom schedule consists of five fields: “* * * * *” or “<i>minute hour date month date</i>”. These five fields are similar to the custom schedule used in the Scripting component.</p> <ul style="list-style-type: none"> • First field refers to minutes. • Second field refers to hour. • Third field refers date. • Fourth field refers month. • Fifth field refers day. <p>For example:</p> <ul style="list-style-type: none"> • “30 8 22 2 *” runs at 08:30 am on February, 22. • “*/30 * * * *” runs at every 30 minutes. • “* /3 * * * *” runs at every 3 hours.
Run after Machine Inventory	The agent supplies metering information after inventory.

7. Select among the following **Deployment** options:

Deploy to All Machines	Select to deploy to all the Machines. Click OK in the confirmation dialog box.
Limit Deploy To Select Labels	Limit deployment to one or more labels. Press CTRL and click to select more than one label.
Limit Deploy To Listed Machines	Add or remove the machines to want to target in the deployment. Use the filter if the list is long. (Inventory provides the list of machines.)
Supported Operating Systems	Select the targeted operating system for the deployment. Press CTRL and click to select more than one operating system. Note: Leave blank to deploy to all operating systems.

8. Click **Save** to save your changes, or click **Cancel** to undo your changes.

Threshold settings for license compliance

The **Home > Summary** tab on the Administrative Console provides a dashboard for the appliance. The License Compliance gauge displays information about the number of installations of licensed software. You can change the percentage of usage that triggers the color changes for warning and critical in the License Compliance chart.

You can eliminate software from being included in warnings and alerts by customizing the license mode. See [To customize the license asset type](#), on page 5

To configure license usage warning thresholds

(This feature is available only on systems with Organizational Management.)

1. Using **Organization: Default**, go to **Settings**.
2. On K1000 Settings: Control Panel, click **General Settings**.
3. Scroll down to License Usage Warning Configurations.
4. Click **[Edit Mode]** and enter the new values.
The default warning threshold is 90. The default critical threshold is 100.
5. To save, click **Override Configuration**.

Administering Asset Management

Now that you have populated your K1000 Management Appliance with assets, you need to keep that information updated. You do this by either:

- Keeping your spreadsheets up to date and reimporting them periodically.
- Maintaining information manually in Asset Management.

The best method depends on the needs of your organization. However, pick one method and use it consistently to ensure that no data is lost.

Scheduling regular imports

To maintain the information in Asset Management more efficiently, continue updating source spreadsheets. Each time you import, the Asset Management component determines whether to import or update records based on what was designated as the primary key (PK) when the asset was created:

- If the primary key matches an existing record, the Asset Management component compares the data and updates the existing record.
- If there is no matching primary key in the row, a new record is generated.

See [Importing Asset Data](#), on page 13, when you reimport data.



Before importing new data, consider running a report to export your current data. That way if there is anything wrong with the structure of the new data, you can more easily return to your original data.

Using asset data in reports

You can export data from Asset Management, which you can archive or run reports on. Besides the reports that you can create, K1000 Management Appliance includes ready-made reports to run on asset data:

- Generate Output
- Unapproved Software Installation

- Software Compliance Simple

See the reports chapter in the *Administrator Guide* for information about the ready-made compliance reports and creating your own reports.

Creating an asset administrator role

You can give limited permissions to other persons so that they can update assets in the appliance, see *Service Desk Administrator Guide*.

Index

A

- administrator, asset 25
- asset data
 - importing 13
- asset types
 - customizing Quick Start 5
 - default 8

C

- computer
 - Field Type 17
- computer assets, changing 17
- csv files
 - exporting 24
 - importing 13

D

- data
 - maintaining 24
- default asset types 8

E

- Excel files
 - exporting 24
 - importing 13
- exporting data 24

F

- Field Types
 - adding 17
 - computer 17
 - Number 17
 - relationships with 18
- filters
 - Asset Detail page 19
 - creating 1
- freeware
 - ignoring 5

I

- Installed seats
 - software 3
- Inventory
 - filters 1

L

- license assets
 - quick start creation 3
- license compliance
 - finding unauthorized installations 24
- license compliance, ignoring freeware 5
- lists
 - creating select lists 20
- location
 - Asset Type 18
- logical assets
 - defined 9
 - overview 11

M

- metering software 20
- multiple select lists, creating 20

P

- parent location
 - filtering 19
- physical assets
 - defined 9
- PK see primary keys 13
- primary keys 13
- processes
 - metering usage 21

R

- reports, using asset data with 24
- roles, creating administrators 25

S

- single select, creating 20
- Smart Labels, creating 1
- software
 - metering usage 21
 - tracking usage 20
- software assets 2
- software licenses 3
- Software Metering 20
 - enabling 22
 - results, checking 21

