



Decision Support System *Software Asset Management (SAM)*

End User QuickStart

Version 1.2.2

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Use it in 8 Steps

DSS SAM is designed to operate from a standard web browser. Log onto the URL for DSS SAM as specified by your system administrator, then enter your username and password. This will display the main DSS SAM application GUI.

1. Review the GUI

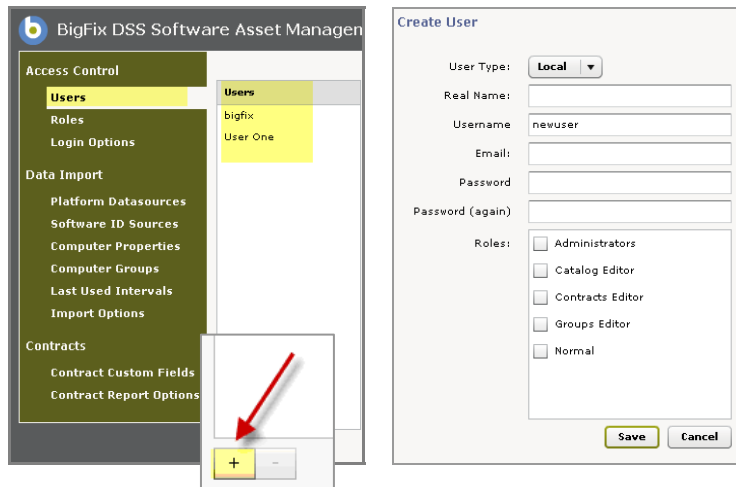
You're at the DSS SAM main screen. First, read through the content on the *Overview* tab, as shown below. Click on the other tabs across the top to get familiar with their content: *Drill Down by Software*, *View All*, *Computers*, *Contract Report*, *Saved Reports*, *Contracts*, and *Software Catalog*.

Note: Tabs are limited by your user role(s). The Control Panel is not visible for all roles.

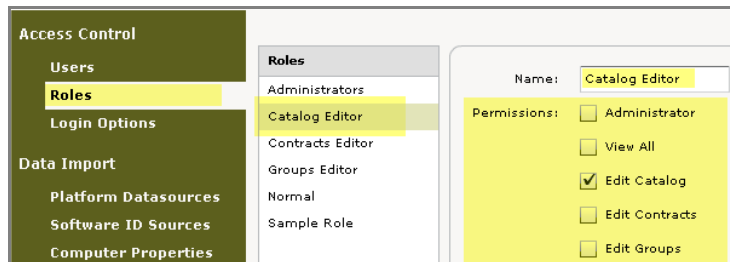
Click on the *Control Panel* button on the top right of the main menu. Read through the contents of the menu on the left side of your screen, then click the *Return to Application* button to return to the Overview screen.

2. Set Up Users

DSS SAM users are divided into four primary roles – Administrators, Catalog Editors, Contracts Editors, and Normal users. Click on the *Control Panel* and select *Users* under *Access Control*. View your current list of users, or click the “+” sign at the bottom of your screen to add new users. Click *Save* after adding or editing each user.

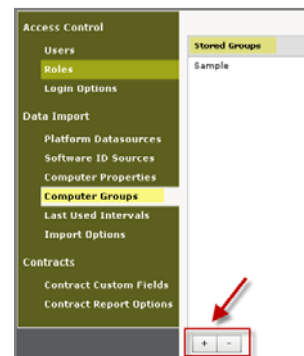


To view, edit, or add user roles, click on *Roles* under *Access Control* and view the roles pre-populated in your system. For each role, review the list of accompanying permissions and check the applicable boxes to assign permissions to each role.



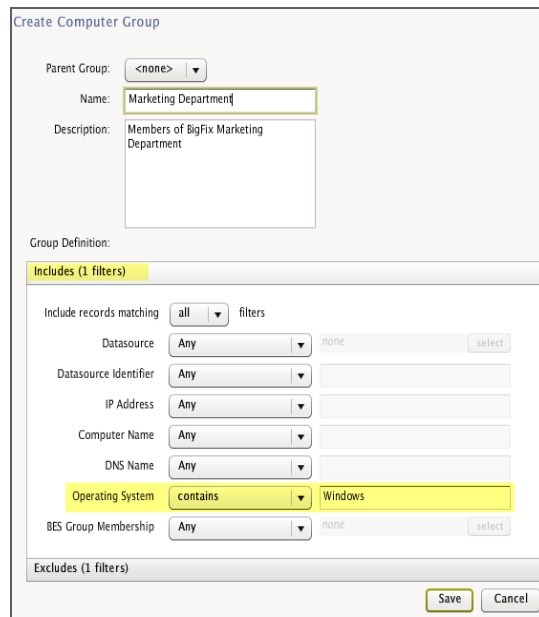
3. Set Up Computer Groups

Computer Groups can be useful for sorting and filtering inventory reports. They can also be used to associate a contract to specific computers. Click on the *Control Panel* and select *Computer Groups* under *Data Import* to view computer groups you have previously created. To create a new group, click the “+” sign at the bottom of the screen.



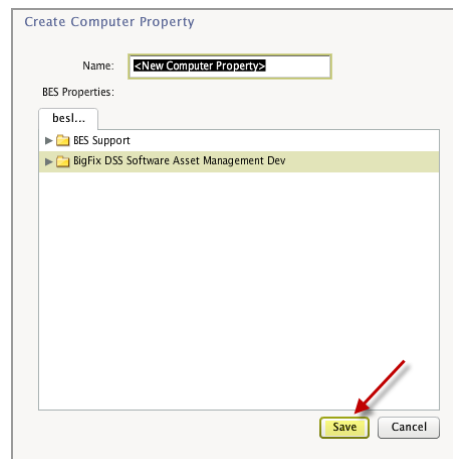
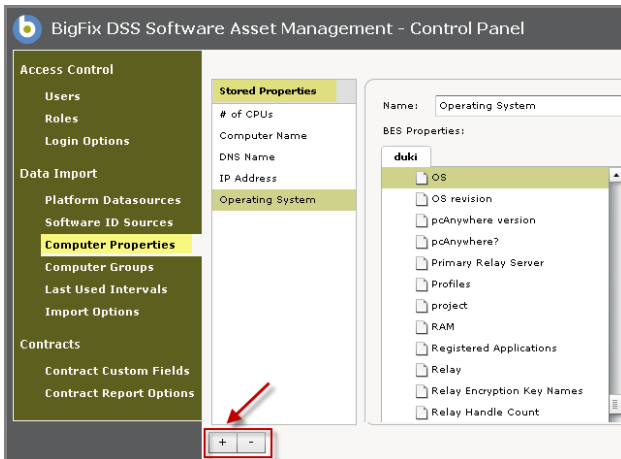
When the Create Computer Group window opens, enter the name of the group and use the Group Definition menus to create filters for your group parameters. If there are additional computer attributes you'd like to use for group parameters, you may add more by adding additional Computer Properties. Click **Save**.

After you've created your new group, view it in the Stored Groups list by clicking Computer Groups in the Control Panel. You may need to run an import to refresh the required attributes before the new groups are available in the DSS SAM components.



4. Set Up Computer Properties

Use the Computer Properties feature to configure the information DSS SAM will display about the computers in your network. Click the *Control Panel*, then select *Computer Properties* under the Data Import menu. View the list of stored properties and the corresponding BES properties displayed on the right side of your screen.

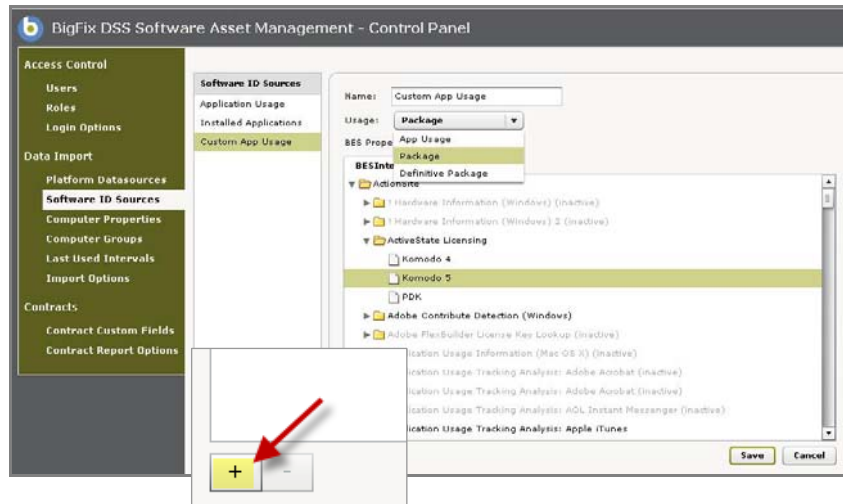


Use the “+” sign to add properties. The computer properties you have defined as Platform Datasources will appear. Open folders by clicking the arrow on the left. Select a property and edit the name that will appear in the DSS SAM views, if necessary.

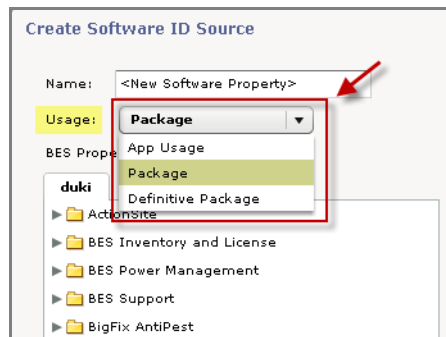
5. Set up Software ID Sources

Software ID Sources, which can include package properties or application usage properties, are BigFix Analysis properties that will be used for software recognition and are correlated to your Software Catalog. A Package is an artifact collected from computers, such as uninstall strings from the Windows registry. Package data can come from any BigFix analysis.

The role of *regular* packages (as opposed to *definitive*) is to serve as a tie breaker to distinguish between two similar executables that look alike. For “ambiguous” software title versions (such as Microsoft Word available as a standalone product and also bundled with Microsoft Office), you can custom-create or add packages from your systems. Click *Software ID Sources* from the Control Panel and click the “+” sign at the bottom of the page.



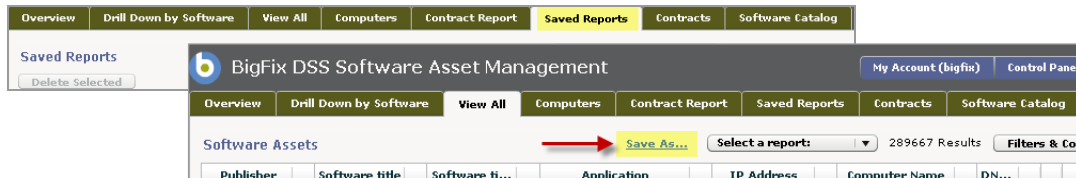
This displays a Create Software ID Source screen, where you can custom create a property for software recognition in your Catalog. Add a property name and click Save. You may also select *Definitive Package* under the Usage pull-down menu to set this property as a “definitive property”. To read more about Definitive Properties, check the DSS SAM *Software Catalog Editor’s Guide*.



6. Reports

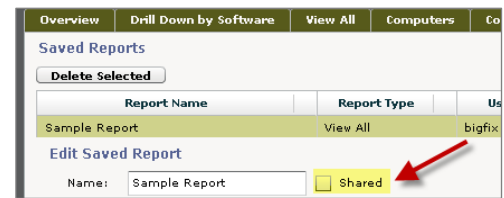
Saved Reports

The Saved Reports feature allows you to quickly view the exact data you need, while saving the parameters of how your information is displayed. Click the *Saved Reports* tab at the top of your screen. If you do not yet have any saved reports, you can create one through the *Save As* button that appears on most of the tabs in DSS SAM. In the Save As dialog, you can select an existing report name to change or you can type in a new name.



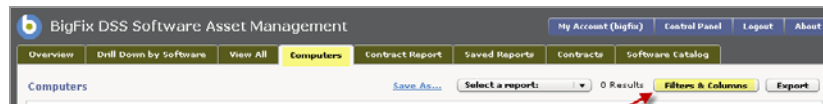
Some instances for using a Saved Report setting can include:

- Specifying useful report filters and parameters to reuse
- Sharing saved reports with other DSS SAM users (click the *Shared* checkbox on the Saved Reports tab)
- Email Saved Reports settings

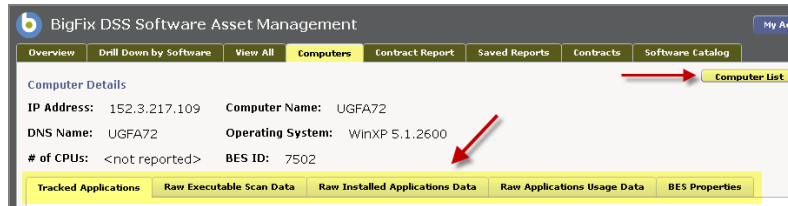


Track Computers

Use the *Computers* tab in the DSS SAM main menu to search for assets in your infrastructure, and use the *Filters & Columns* feature to customize how your data will display.



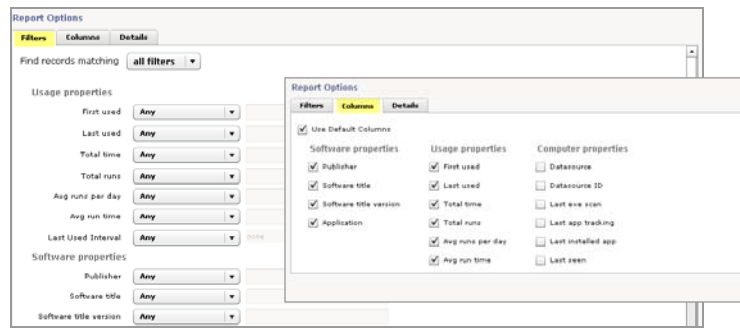
Click on a computer displayed in the list to view tracked applications, raw data, and properties.



Track Software

Click the *View All* tab in the DSS SAM main menu to view a complete list of your IT assets, along with usage statistics and asset configuration information. Click the *Filters & Columns* button to customize the information you need about your assets and how you want it to display.



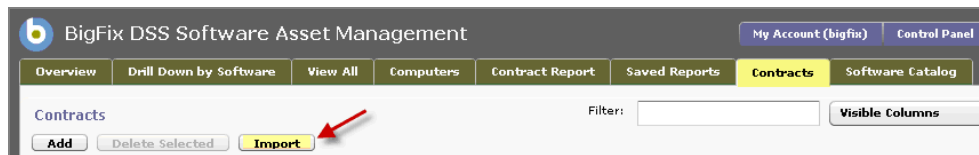


Contracts

BigFix DSS SAM gives you a full array of flexible tools to configure the way your Contracts data is collected, arranged, displayed and reported. It allows customization options for adding and modifying fields, and other selection tools correspondent to your reporting needs.

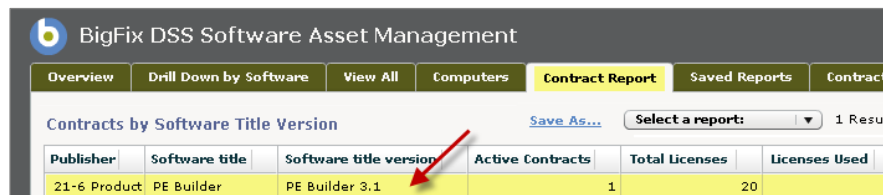
Import Contract Reports

For detailed information about contracts in DSS SAM, see the *DSS SAM User's Guide* and the *Software Catalog Editor's Guide*. In DSS SAM version 1.2.2, you are now able to import contract reports from an external .CSV file. Initiate the import by clicking the *Import* button on the Contracts tab primary screen.



View Contract Reports

The primary function of your SAM deployment is to generate the reports you will use to meet regulatory and compliance obligations and to help you monitor and manage your software expenditures. Click the *Contract Report* tab to browse data on your software licenses. Compare this data with your asset inventory to audit license compliance agreements.



7. Drill Down by Software

Click the *Drill Down by Software* tab on the DSS SAM main page and view the title menus. Click on one of the displayed publishers, and use the drill down method to gather more detailed information about your software assets.

Publisher	Total Computers	Total Runs	Total Time	Average Ru...
Copernic Technolo...	2	7	5 hrs 12 mins 53 s	0
Core FTP	1069	538	34 wks 3 days	0
Core Corporation	417	23373	7 yrs 10 wks	0

Software title	Total Computers	Total Runs	Total Time	Average Runs ...
Core Paint Shop ...	1	94	2 days 21 hrs 55 mir	0.27
Core Paint Shop ...	1	0	0 secs	N/A
Core Paradox	4	0	0 secs	N/A

Software title version	Total Computers	Total Runs	Total Time	Average Runs
Core Paradox 9	4	0	0 secs	

8. Export

The *Export* button is located on the top right of the *Drill Down by Software*, *View all*, *Computers*, and *Contract Reports* tabs. Export the information on your screen to either .CSV or .PDF format.

The screenshot shows the 'Software Catalog' tab with the 'Export' button highlighted. The 'Export Options' dialog box is open, showing 'Choose export format:' with radio buttons for 'CSV' (selected) and 'PDF'. There are 'Submit' and 'Cancel' buttons at the bottom of the dialog.

Support

BigFix offers a suite of support options to help optimize your user-experience:

- First, check the BigFix website [Documentation](#) page:
- Next, search the BigFix [Knowledge Base](#) for applicable articles on your topic:
- Then check the [User Forum](#) for discussion threads and community-based support:

If you still can't find the answer you need, [contact](#) BigFix's support team for technical assistance:

- Phone/US: 866 752-6208 (United States)
- Phone/International: 661 367-2202 (International)
- Email: enterprisesupport@bigfix.com