



Decision Support System *Software Asset Management (SAM)*

User's Guide

Version 1.1

July, 2009

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Contents

Part One	4
Introduction	4
Background	4
System Requirements.....	4
User Accounts and Access Recommendations.....	5
Deployment Sizing Requirements	6
Hardware Specifications.....	6
What You Should Know First	7
New Features in DSS SAM Version 1.1.....	7
Non-Windows Support	9
Part Two	10
How-To	10
1. Review the GUI	10
2. Set Up Users.....	11
3. Set Up Computer Groups	13
4. Set Up Computer Properties.....	14
5. Set Up Package Properties.....	15
6. Reports	16
Saved Report Settings	16
Track Computers.....	17
Track Software.....	17
Contracts	18
Import Contract Reports	22
View Contract Reports	23
7. Drill Down by Software.....	23
8. Export	24
Part Three	25
Resources	25
Advanced Features	25
FAQs.....	27
Additional Documentation	27
Global Support	28

Introduction

Background

A well-implemented Software Asset Management (SAM) initiative creates significant cost savings across your enterprise - on software as well as process and infrastructure. It puts you in a stronger negotiating position with software vendors and, most importantly, provides you with a powerful peace of mind when it comes to the complexities of license compliance. With a healthy SAM implementation within your environment, you'll always know what software you have, where it is, and how it's being used.

Offered as an add-on to the [Systems Lifecycle Management](#) suite, BigFix DSS SAM is a powerful solution for discovering software installed on the desktops, laptops and servers in your environment. Its powerful technology matches your software usage with the software publisher's license information for immediate, accurate and automated license "true-ups". By identifying precise information on software licensing and usage, you can quickly identify and remediate any noncompliant use of software, enterprise-wide.

The DSS SAM application can help your enterprise support contract negotiations, vendor audits and IT budget planning; accurately identify software and validate software license compliance; discover and eliminate unauthorized or risky applications; reduce overspending and reallocate software based on usage trends; and feed your asset repository with accurate and fresh data.

System Requirements

- The DSS SAM application must be installed on a Microsoft Windows 2003 Server (32-bit or 64-bit). This will be your target application server.
- BigFix Server version 7 must be available in your environment. The BigFix DSS SAM application may be installed on the same server, or on a separate server.
- SQL Server 2005 or 2008 (32-bit or 64-bit) with TCP/IP must be available in your environment. This server may be on the same computer as the DSS SAM application or on a separate server. You may use the same database server used for the BigFix Server, or a separate database server, depending on the size of your deployment and available hardware resources. This version of DSS SAM supports all editions of SQL Server 2005 and 2008.
- SQL Server Browser is needed if you are using a named instance rather than the default instance of SQL Server. It is also needed by the Configurator to enumerate named instances in the server's combo box on the SQL credentials panel.

SQL Server Required Components

Component	Required by DSS SAM
SQL Server 2005 or 2008	Yes
SQL Server Active Directory	No

SQL Server Agent	Yes
SQL Server Browser	Yes
SQL Server Full Text Search	No
SQL Server VSS Writer	No

- Users and Administrators of the DSS SAM application must use Internet Explorer version 7 or FireFox version 3 (or later versions) and Adobe Flash version 10 (or later) to access the application. Your browser needs to have cookies enabled in order to run the application properly.
- To generate PDF format reports (in addition to CSV), you must have the Java JDK version 1.4 or higher (Java Development Toolkit) on your DSS SAM Server. (Note: This is different than Java Runtime Environment.) Access Java JDK from Sun's website: <http://www.sun.com/download/index.jsp> or <http://java.sun.com/javase/downloads/index.jsp> to download the latest JDK. If JDK is not installed, all DSS exports will use the CSV output rather than PDF. For specific installation instructions, go to the BigFix Knowledge Base at <http://support.bigfix.com/>.

User Accounts and Access Recommendations

During installation and configuration, you will be asked for usernames and passwords. Each stage of the installation (which installs different components) may require a user with different permissions. Use the table below to determine which username to use according to your stage of the installation process:

- Stage 1** – Subscribe to the Content Site
- Stage 2** – Install the DSS SAM application
- Stage 3** – Configure the services that run the software
- Stage 4** – Configure the connection from DSS SAM to the databases

Stage	Account Requirements	Type
1. Subscribe to DSS SAM Content Site	BES Operator login with permissions to subscribe to content sites	BES Operator
2. Install the application	Administrator for the O/S where you're installing DSS SAM	Domain or local
3. Configure the services that run DSS SAM and connect to the databases	Service account with db_datareader permissions on BES DB and read permission to the BigFix server upload manager directory	Domain
4. Create the DSS SAM databases	Specify using the service account with Administrator permissions on the database server, or User with SQL Authentication with Administrator permissions on database server	Domain SQL

For additional guidance on user accounts and access, check the [Knowledge Base](#) on the BigFix support site.

Deployment Sizing Requirements

The DSS SAM application is designed to run in a variety of deployment configurations, depending on the size and architecture of your system and how you intend to use the application. Sizing requirements and hardware specifications will vary according to your configuration.

Consider the following factors to ensure the correct component processing speed, RAM, and disk space to accommodate your BigFix Client capacity:

- The number of users accessing the DSS SAM application will determine how much processing power and RAM your server must have.
- The number of BigFix Clients will determine the amount of disk space required for files and for the database server.

Note: If you are using SQL Server Express Edition, see the Microsoft website for size limitations.

For a two-computer server configuration, 1MB per BigFix Client should be allocated on the BigFix Server split between files and the database, and 1-2MB per BigFix Client on the DSS SAM application system, also split between files and database.

For example, 10,000 BigFix Clients would require 10GB of free space on the BigFix Server, and 10-20GB free space on the DSS SAM application machine. This scenario would require the BigFix Server database to be on the same machine as the DSS SAM application. For sizing requirements on other deployment configurations, see the Appendix in this Guide.

Hardware Specifications

The values listed below are recommended hardware specifications that will provide optimum performance for similar sized deployments of the DSS SAM application. If your deployment will include over 20 DSS SAM application users, consider augmenting your hardware specifications to the next higher scale, or contact BigFix Technical Support for assistance with hardware selection.

For best performance, consider the following recommendations:

Deployment Size	CPU	Memory	Hard Disks
< 250	2-3 GHz	1 GB	Standard HD
1,000	2-3 GHz - 2 Cores	2 GB	1 RAID Array (RAID 10, 5)
10,000	2-3 GHz - 2-4 Cores	4 GB	1-2 RAID Arrays (RAID 10)
50,000	2-3 GHz - 4 Cores	8 GB	2 RAID Arrays (RAID 10)
100,000	2-3 GHz - 4-8 Cores	12 GB	3 RAID Arrays (RAID 10)
> 200,000	2-3+ GHz - 8-16 Cores	16+ GB	3-4 RAID Arrays (RAID 10)

RAID arrays must support use of the disk cache for both reading and writing. The disk cache should be set to 50/50 read write.

What You Should Know First

To initiate a proper deployment of DSS SAM within your enterprise, you should first be familiar with the BigFix Platform and have read the *BigFix Console Operator's Guide*. Then, begin with the *DSS SAM Installation and Configuration Guide*.

Once you've properly installed and configured DSS SAM in your environment, use this *User's Guide* to learn about the basic functionality of each component of the application. Then, the *DSS SAM Software Catalog Editor's Guide* will show you how to set up your catalog to match your deployment, as well as describing the processes for manipulating your catalog contents. The *DSS SAM Software Catalog Visual Guide* provides additional, high level support for Catalog use. For a deeper understanding of Software Asset Management software, review the *DSS SAM Implementation Guide*.

New Features in DSS SAM Version 1.1

- **Software Inventory Support Available for all Platforms**

Now DSS SAM is available for Windows *and* non-Windows users. For specific details related to non-Windows support, see the next section of this Guide.

- **Elimination of “Unblessed” Catalog Items**

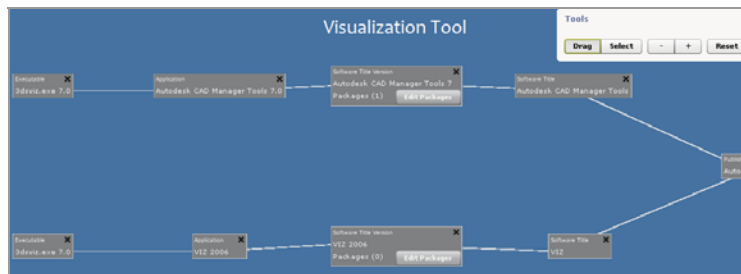
This new version has eliminated the previous “hidden/unblessed” state for Catalog items. This feature provides significantly more out-of-the-box software recognition than DSS SAM version 1.0.

- **Content Updates to Software Catalog**

This version of DSS SAM includes thousands of new content entries to the Software Catalog. This additional content will give you a more comprehensive list of software inventory to match up with your existing deployment.

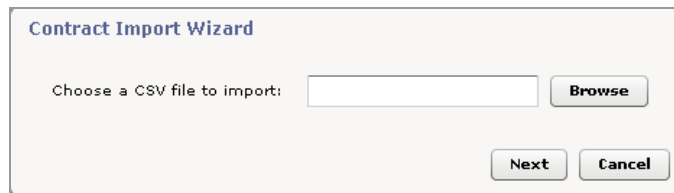
- **Visualization Tool for Ambiguous Entries**

Through an upgrade to the Software Catalog, DSS SAM 1.1 has created a workflow to distinguish between similar or “ambiguous” catalog entries. This workflow, called a **Visualization Tool**, is outlined in the Software Catalog Editor's Guide and enables you to add “package” data from your system to sync up your software catalog with the content in your native deployment.



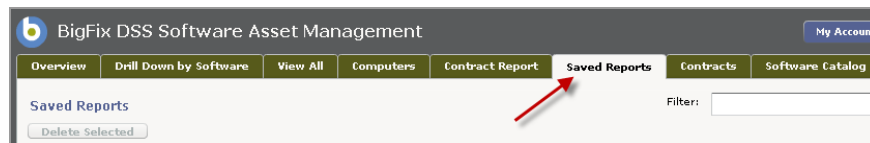
- **Contract Import wizard**

This new feature facilitates the import of license and financial information into DSS SAM from a .CSV file for license compliance reporting.



- **Saved Reports**

Allows you to save and share important and frequently used report views for one-click access to common reports.



- **SQL Server Support**

DSS SAM version 1.1 comes with support for SQL Server 2008, SQL Server 2008 Express, and SQL Server 2005 Express.

- **Enhanced DSS SAM Deployment Dashboard**

This version includes additional fault tolerance in the inventory collection process and additional information about the status of your inventory. For example, right-click on the Deployment Health chart to see a breakdown of the inventory health issues.



Non-Windows Support

DSS SAM 1.1 offers software inventory support for Mac, Unix, and Linux (in addition to the support for Windows already available).

The way non-Windows support works in DSS SAM version 1.1 is by using “package properties”. See page 34 of the DSS SAM *Installation and Configuration Guide* and the *Software Catalog Editor’s Guide* for more details. “Definitive” packages do not need executables listed in the catalog.

The Software Catalog shipping with DSS SAM version 1.1 does not yet include any non-Windows software titles. Users must enter their own entries and manually map them to the definitive package property data that they create.

Usage data for non-Windows is not available – only inventory data is available.

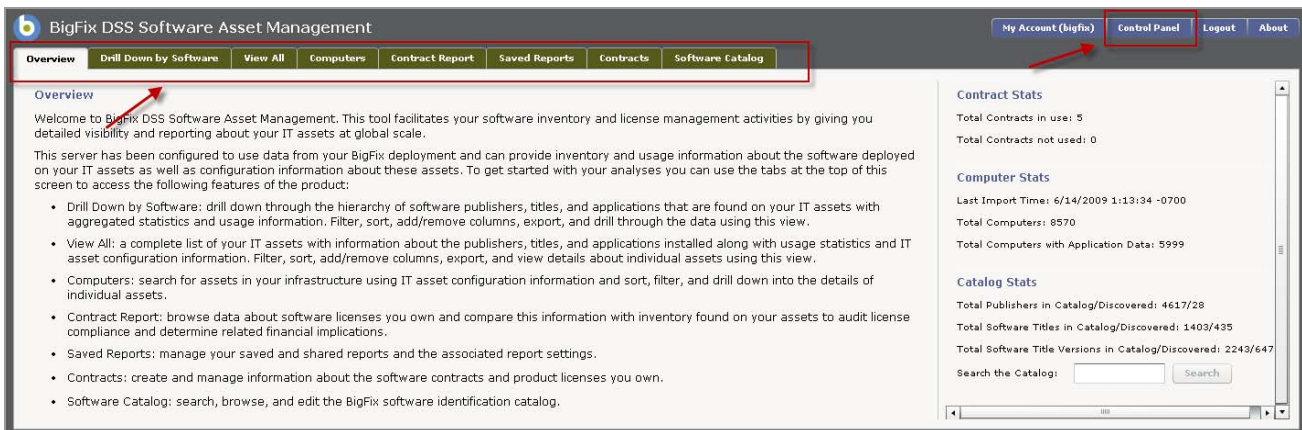
How-To

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.

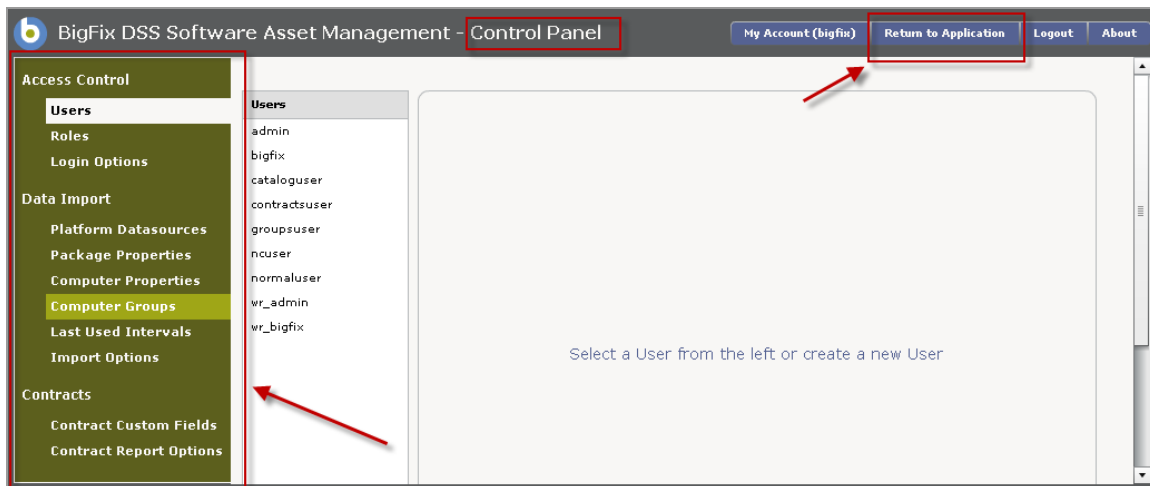
1. Review the GUI

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

Note: The tabs you see are limited by your user role(s) as assigned by the application Administrator. For example, the Control Panel is not visible for all roles.



Now 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 main screen.



2. Set Up Users

DSS SAM users are divided into four different and essential roles:

- Administrators Can access all DSS SAM functionality, including creating users, modifying permissions, deleting users, creating data sources and running imports.
- Catalog Editors Can browse and edit the software catalog.
- Contracts Editors Can create and edit contracts and browse the software catalog.
- Normal Users Can browse through the tabs in DSS SAM and adjust view options, but cannot make any changes.

Each user role, regardless of location, plays a critical part of how DSS SAM is used. For detailed information on setting up user roles, see the *DSS SAM Installation and Configuration Guide*.

DSS SAM makes it possible to have portions of a geographically distributed team work from their respective remote locations to edit the catalog and contracts data pertaining to their localized requirements. This approach helps streamline IT processes to avoid bottlenecks in the workflow.

The figure below suggests a process to prepare SAM for monitoring licensed and authorized Users and also calls for continuous updating.

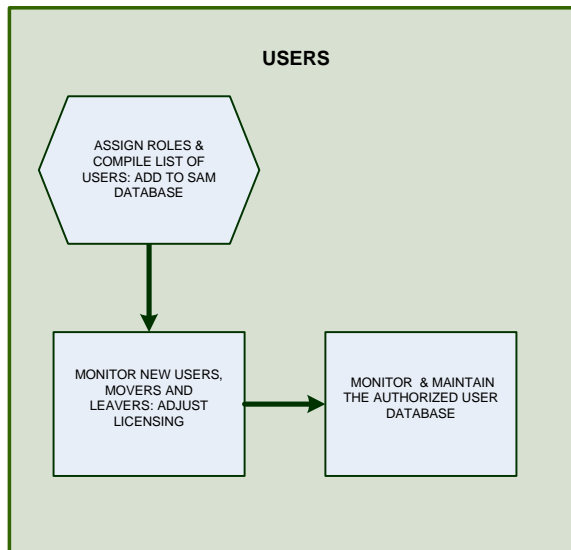
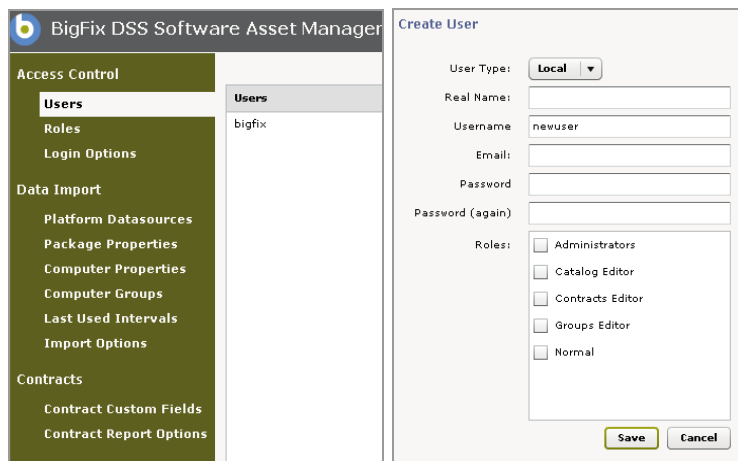
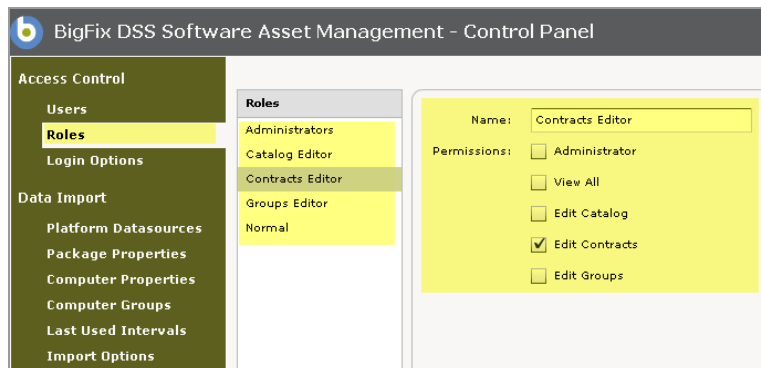


Figure 1. Monitoring and Updating Users in the SAM Database

To set up Users, click on the *Control Panel* and select Users under the *Access Control* menu. View your current list of users, or click the *Plus 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 already 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

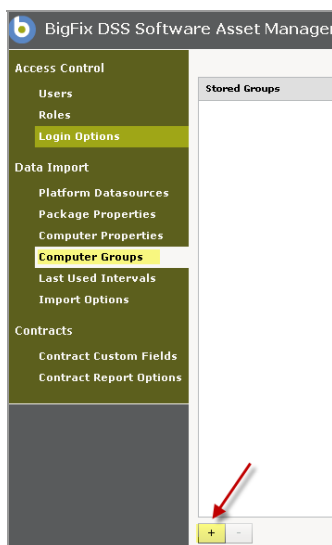
Computer Groups can be useful for sorting and filtering inventory reports. They can also be used with Contracts to associate the Contract to specific computers.

When you associate a Contract to a Computer Group, you are indicating which computers are entitled to the licenses described by that Contract. In the Contract Analysis, licensed and unlicensed computers will be drawn from the entitled Computer Group. Untitled Computers are those computers outside the Computer Group that also have the software title version that is associated with the contract.

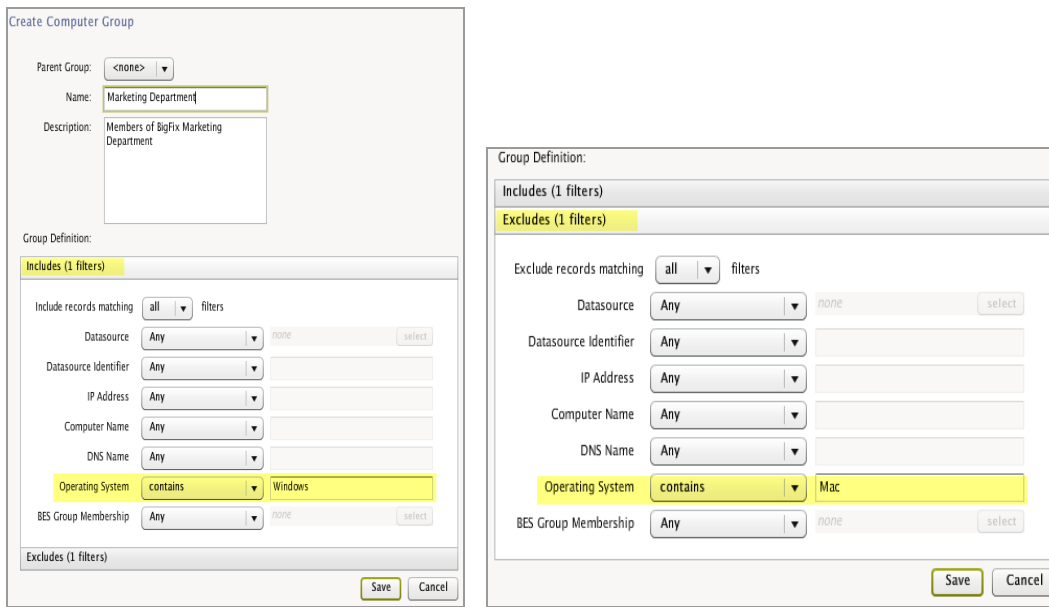
With this analysis, you can see:

- **Licensed computers** -- those computers in the Computer Group with the software installed that are entitled to the software,
- **Unlicensed computers** -- those computers in the Computer Group with the software installed that are entitled to the software, but there are not enough licenses for the number of computers with the software installed, and
- **Untitled computers** -- those computers with the software installed that are not entitled to the software because they are not in the Computer Group associated with the contract.

Click on the Control Panel and select Computer Groups under the *Data Import* menu to view any computer groups you have previously created. To create a new group, click the *Plus Sign* at the bottom of the screen.

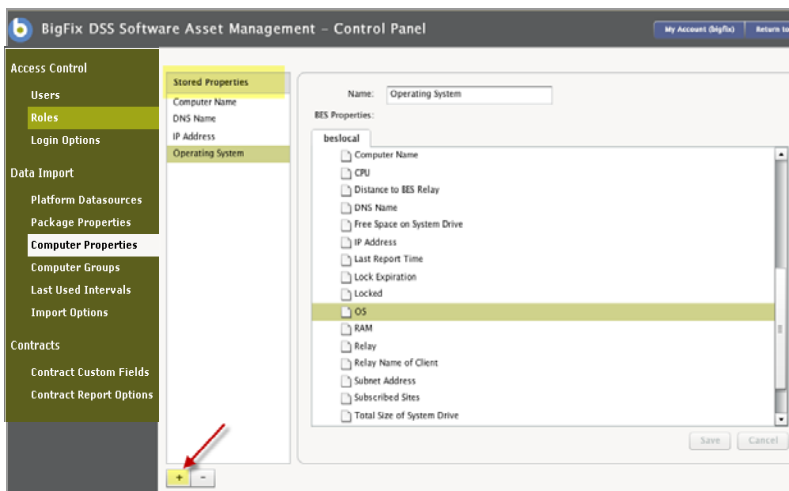


In the Create Computer Group box, enter the name of the group and use the Group Definition menus to create filters for your group parameters. If there are additional computer attributes you'd like to use for group parameters, you may add more by adding additional Computer Properties (described in the next section). Click *Save*. After you've created your new group, view it in the Stored Groups list. You may drag one group into another to make it a "child" or subgroup of that group. You may need to run an *Import* to refresh the required attributes before the new groups become available in the DSS SAM components.



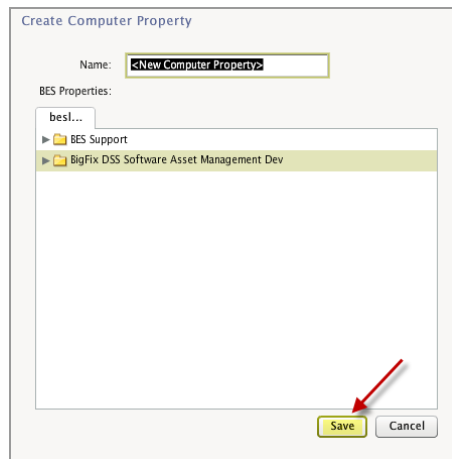
4. Set Up Computer Properties

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.



To add more properties to the list, click the “+” sign on the bottom of your screen. The computer properties available on the BigFix platform server(s) you have defined as Platform Datasources will appear.

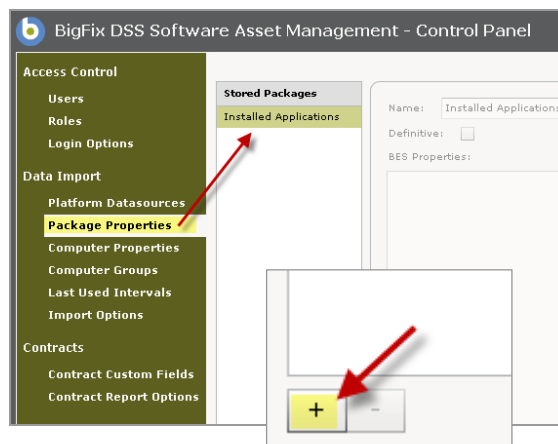
Open the folders by clicking the arrow on the left. Select a property and edit the name that will appear in the DSS SAM views, if necessary.



5. Set Up Package Properties

Package Properties are BigFix analysis properties that will be used for software recognition. These properties will be 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 software *regular* (as opposed to *definitive*) packages within the DSS SAM Software Catalog is to serve as a tie breaker to help distinguish between two executables that look alike. For “ambiguous” software title versions (such as Microsoft Word available as a standalone product and also bundled with Microsoft Office), it is important to have associated packages that reflect the exact software packages you have installed. The way to do this is by custom-creating or adding packages from your systems. Click *Package Properties* from the Control Panel. Then click the “+” sign at the bottom of the page. The role of definitive properties is to serve as the primary source of information about software installed on your computers. Software title versions using definitive properties do not need executables for software recognition.



This displays a Create Package Property screen, where you can custom create a property for software recognition in your Catalog. Add a property name, and click **Save**. You may also click the **Definitive** button 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 Report Settings

The new 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 to see a list of your saved reports. In the Save As dialog, you can either select an existing report name to change or enter a new name.



If you do not yet have any saved reports, you can create a Saved Report through the *Save As* button that appears on all 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.

Publisher	Software title	Software ti...	Application	IP Address	Computer Name	DN...		
@Last Software	SketchUp	SketchUp 4.0	SketchUp 4.0	152.3.243.169	PPS00445	PPS0044!	W	N/
@Last Software	SketchUp	SketchUp 4.0	SketchUp 4.0	10.254.254.253...	AAS3769	AAS3769.	W	N/

All Saved Reports will be accessible in one location, so you can find whatever report you want without clicking through the tabs.

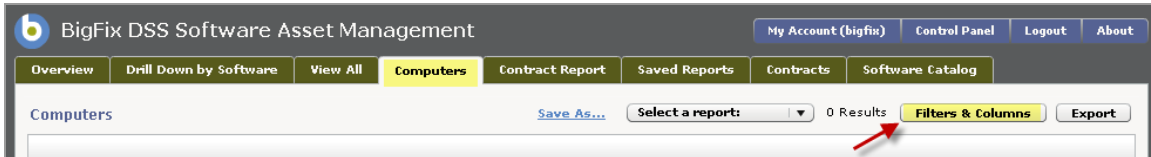
Some instances for using a Saved Report setting can include:

- Create a saved report by specifying all the filters to reuse in the future.
- When navigating through the application, you may find a report that would be useful – this feature allows you to save that current “view” as a Saved Report. The next time you need to view that data, your view-settings are saved in that report.

- Share saved reports with other DSS SAM users by clicking the Share checkbox on the report options on the Saved Reports tab.
- Email Saved Reports settings for even more automation.

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.

The screenshot shows the 'Computer Details' page for 'HAMERKOP'. It displays system information and a table of tracked applications.

Computer Details

Computer Name: HAMERKOP DNS Name: Hamerkop.bigfix.com
 Operating System: WinXP 5.1.2600 IP Address: 192.168.105.129
 BES ID: 3240587

Tracked Applications	Raw Executable Scan Data	Raw Installed Applications Data	Raw Applications Usage Data	BES Properties			
Publisher	Software title	Software title vers	Application	First used	Last used	Total time	Total r
BigFix Inc.	BigFix Enterprise Clie	BigFix Enterprise Clie	Bigfix Enterprise Clie	1/3/2007 4:49:00	10/24/2008 1:45:00	5 days 7 hrs 48 min	
BigFix Inc.	BigFix Enterprise Con	BigFix Enterprise Con	BigFix Enterprise Con	9/22/2008 23:32:00	10/21/2008 19:11:00	15 hrs 16 mins	
BigFix Inc.	BigFix Enterprise Ser	BigFix Enterprise Ser	BigFix Enterprise Ser	9/22/2008 23:28:00	10/24/2008 1:45:00	4 days 15 hrs 3 min	
Computer Associate	eTrust Antivirus	eTrust Antivirus 7	eTrust Antivirus 7.1	9/22/2008 23:29:00	10/24/2008 1:45:00	4 days 5 hrs 20 min	

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.

The screenshot shows the 'View All' tab in the BigFix DSS SAM main menu. A table of software assets is displayed, and the 'Filters & Columns' button is highlighted with a red arrow.

Publisher	Software title	Software title version	Application	Computer Name	Operating System	First used	Last used	Avg runs per day	Avg run time
BigFix Inc.	BigFix Enterprise	BigFix Enterprise Client 7	BigFix Enterprise Client 7	HAMERKOP	WinXP 5.1.2600	1/3/2007 4:49:00	10/24/2008 1:45:00	<1	1 hrs 42 mins 14 secs
BigFix Inc.	BigFix Enterprise	BigFix Enterprise Console 7	BigFix Enterprise Console 7	HAMERKOP	WinXP 5.1.2600	9/22/2008 23:32:00	10/21/2008 19:11:00	<1	50 mins 56 secs
BigFix Inc.	BigFix Enterprise	BigFix Enterprise Server 7	BigFix Enterprise Server 7	HAMERKOP	WinXP 5.1.2600	9/22/2008 23:28:00	10/24/2008 1:45:00	<1	3 hrs 57 mins 58 secs
Computer Associates Int	eTrust Antivirus	eTrust Antivirus 7	eTrust Antivirus 7.1	HAMERKOP	WinXP 5.1.2600	9/22/2008 23:29:00	10/24/2008 1:45:00	<1	3 hrs 37 mins 9 secs
Microsoft Corporation	Microsoft .NET Framework	Microsoft .NET Framework 1	Microsoft .NET Framework 1	HAMERKOP	WinXP 5.1.2600	N/A	N/A	N/A	N/A
Microsoft Corporation	Microsoft Office	Microsoft Office 2003 Professional Edition	Microsoft Powerpoint 2003	HAMERKOP	WinXP 5.1.2600	10/7/2008 10:16:00	10/16/2008 10:16:00	<1	9 secs
Microsoft Corporation	Microsoft Office	Microsoft Office 2003 Standard Edition	Microsoft Powerpoint 2003	HAMERKOP	WinXP 5.1.2600	10/7/2008 10:16:00	10/16/2008 10:16:00	<1	9 secs
Microsoft Corporation	Internet Explorer	Internet Explorer 6	Internet Explorer 6.0	HAMERKOP	WinXP 5.1.2600	9/23/2008 0:00:00	10/24/2008 0:00:00	6	2 hrs 5 mins 13 secs

Report Options

Filters Columns Details

Find records matching **all filters**

Usage properties

First used **Any** 12:00:00

Last used **Any** 12:00:00

Total time **Any** 0:00:00

Total runs **Any**

Avg runs per day **Any**

Avg run time **Any** 0:00:00

Last Used Interval **Any** none select

Software properties

Publisher **Any**

Software title **Any**

Software title version **Any**

Application **Any**

Computer properties

Datasource **Any**

Datasource ID **Any**

Last exe scan **Any**

Last app tracking **Any**

Last installed app **Any**

Last seen **Any**

Group Membership **Any** none

Computer ID **Any**

Apply Save & Apply Cancel

Report Options

Filters Columns Details

Use Default Columns

Software properties	Usage properties	Computer properties
<input checked="" type="checkbox"/> Publisher	<input checked="" type="checkbox"/> First used	<input type="checkbox"/> Datasource
<input checked="" type="checkbox"/> Software title	<input checked="" type="checkbox"/> Last used	<input type="checkbox"/> Datasource ID
<input checked="" type="checkbox"/> Software title version	<input checked="" type="checkbox"/> Total time	<input type="checkbox"/> Last exe scan
<input checked="" type="checkbox"/> Application	<input checked="" type="checkbox"/> Total runs	<input type="checkbox"/> Last app tracking
	<input checked="" type="checkbox"/> Avg runs per day	<input type="checkbox"/> Last installed app
	<input checked="" type="checkbox"/> Avg run time	<input type="checkbox"/> Last seen

Apply Save & Apply Cancel

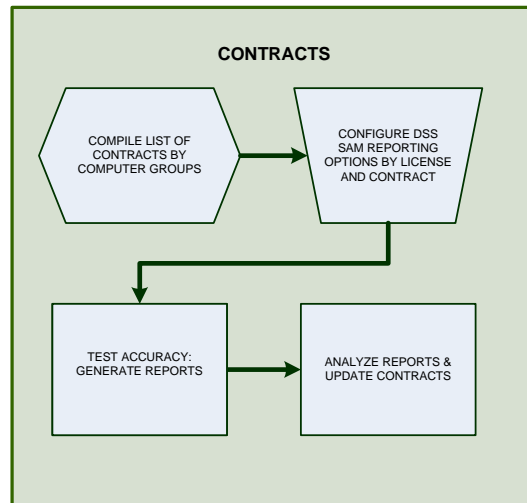
Contracts

How you design your Contracts management workflow is directly related to the overall success of your DSS SAM implementation. First, DSS SAM's Contracts tools can help you:

- Track all costs associated with specific contracts and help eliminate any ambiguous terms or language
- Create your Contracts reporting to conform to internal or external service level agreements (SLAs)
- Stay within your internal corporate compliance policies
- Monitor and correct any questionable licensing issues that might arise
- Calculate costs for replacements and updates or downsizing a contract's license quantity
- Avoid unnecessary costs for non-compliance

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.

The figure below shows the process required to prepare SAM for creating and updating the Contracts data and also calls for continuous updating.



Compile List of Contracts by Computer Groups

Endpoints will generally fall into categories that can be grouped by function or even geography. These might be by department, by business units or by any functional distinction. This helps to contextualize the types of software being used across your enterprise and is useful for meaningful analysis. The first step is to enter a complete list of your current software contracts into DSS SAM.

For example, financial applications will typically find wider usage in Finance and Procurement departments, while marketing departments may have heavier usage in graphics design applications. Knowing that a computer in Shipping has graphics editing software installed and has very low usage indicates that the application is not cost effective and can be removed. DSS SAM's contracts editing and reporting tools help you to track and manage these and other costs by allowing you to see how and where the contracts and licenses are deployed.

Configure DSS SAM Reporting Options

Contracts Editors configure and customize the Contracts information you need to see in your reports. Contracts Editors can create custom fields and assign priorities to how the information is ordered, either by license or contract, cost, date, etc. These functions are done in the DSS SAM Control Panel under the Contracts heading. It is important for the Software Asset Management Director to work with the various stakeholders and the Contracts Editor to devise a Contracts reporting policy that accommodates the company's requirements.

Types of Licensing

DSS SAM allows you to add filtering criteria to your Contracts data, such as the types of licenses that are being entered and tracked:

- Trial software – Applications available for pre-purchase limited time period
- Product software – Applications or packages purchased from the publisher or an authorized reseller

- Solution software packages – Software packages with multiple licenses from different publishers
- Versions – The same software title but all the various versions for which you have valid licenses
- Bundled software or “Suites” – Related software titles (each available separately) that are grouped together (Microsoft Office, Adobe Creative Suite, etc.)
- OEM – Software repackaged by a third party either with a different name or contained in a different package or bundle

The ability to fragment software titles in this way may be useful to understand your company’s purchasing habits and develop strategies to minimize redundancies or unused applications.

Test Accuracy: Generate Reports

To ensure the usefulness and accuracy of your Contracts data, generate reports and analyze not only the data but its presentation based on the priorities and criteria assigned. It is often much easier and cost effective to make adjustments during a test cycle than after it has gone live across your enterprise.

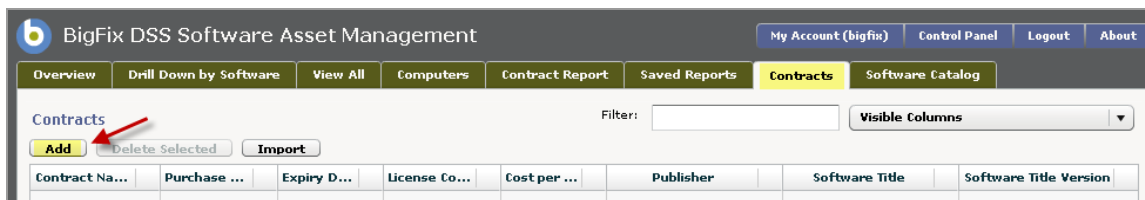
Analyze Reports and Update Contracts

Once the initial Contracts reporting criteria have been entered by the Contracts Editor, reports should be distributed to stakeholders for feedback on accuracy and relevance. Once a final configuration finds consensus, that configuration should be written into corporate policy to ensure consistent, accurate reporting.

Start Creating Contracts

To create contracts, click on the *Contracts* tab in the DSS SAM main menu to manage information about the software contracts and products licenses in your enterprise. Click *Add* to create a new contract for your software licenses.

Note: Alternatively, you may right click on a title version in the *Drill Down by Software* tab and add a contract for that title version.



At the *Create Contract* dialog box, enter the name of your new contract, then populate the fields on the right.

First, find the software title for which you will create a contract. Click the *Select* button located next to Software Title Version, and type the name of the software in the Search box shown below. A list of possible software title versions will auto-populate below the search field. Scroll through the list to locate the exact software title you want, then enter information in the remaining fields in the Create Contract dialog box. Click *Save*.

Now view your newly-created contract.

BigFix DSS Software Asset Management

My Account (bigfix) Control Panel

Overview Drill Down by Software View All Computers Contract Report Saved Reports **Contracts** Software Catalog

Contracts

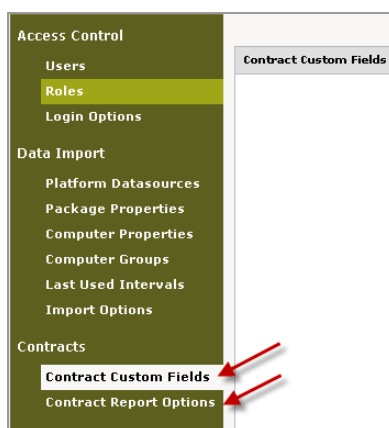
Add Delete Selected **Import**

Contracts have changed since we last generated Contract Reports.

Name	Purchase Date	Expiry Date	License Count	Cost per Unit	Publisher	Software Title	Software Title Version
Adobe Contract 1	7/1/2008	7/1/2009	100	499.00	Adobe Systems Incorporated	Adobe Photoshop	Photoshop 7

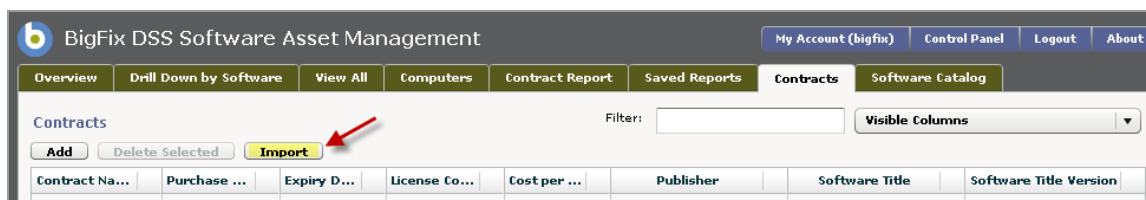
You may allocate licenses to computers or computer groups by selecting the group on the Create Contract form. Do this by clicking the *Contracts* tab, click the *Add* button in the top left, then populate the Create Contract form.

To define the order in which licenses are allocated to computers in a group, use the *Contract Report Options* tab in the Control Panel. To create custom Contract data fields, use the *Contract Custom Fields* tab in the Control Panel.



Import Contract Reports

In DSS SAM version 1.1, you are now able to import contract reports from an external .CSV file. To do this, initiate the import by clicking the Import button on the Contracts tab primary screen.



Specify a particular .CSV file to upload from any UNC path accessible from the client computer. DSS SAM displays the first few rows of data from the uploaded file along with mapping options. “Mapping options” in this context indicate how columns in the .CSV file correlate to the fields in a DSS SAM contract. Available fields are:

- Contract Name
- Purchase Date
- Expiry Date
- License Count

- Cost
- Software Title Version ID (the Software Catalog ID)
- Software Title Version Name
- Computer Group
- Custom Fields

If any mapping conflicts exist for Software Title Versions or Computer Groups, you will be presented with options for resolving those conflicts during the import workflow.

If any type-data mismatches or data length violations occur, you will be presented with options for resolving those conflicts.

If there are any blank required fields in the CSV, they will be left blank in the imported contracts. You will need to manually populate these later.

After the import, the system reports how many rows were imported and how many were ignored. For ignored rows, you can download a separate CSV file of *just* all the ignored rows. This CSV file contains all of the original data of the uploaded CSV file with the addition of an “__ImportErrorMessage__” column detailing why a particular row was ignored.

Note: For contract imports, only one value for a check box can be imported.

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. Ultimately, it is the reporting that will save your enterprise money and elevate your compliance standing.

Now that you’ve created a licensing contract in the previous step, click the *Contract Report* tab to browse data on your software licenses. Compare this data with your asset inventory to audit license compliance agreements.

Publisher	Software title	Software title version	Active Contracts	Inventory	Licensed Computers	Unlicensed Computers	Cost Delta
Adobe Systems	Adobe Photoshop	Photoshop 7	1	100	0	0	

7. Drill Down by Software

Click the *Drill Down by Software* tab on the DSS SAM main page and view the title menus, as highlighted below.

Publisher	Total Computers	Total Runs	Total Time	Average Runs per Day	Average Run time	Used 1 week ago	Used 2 weeks ago	Used 3 weeks ago
BigFix Inc.	1	121	1 wks 3 days 14 hrs	<1	2 hrs 10 mins 23 secs	0	1	1
Computer Associates Internation...	1	28	4 days 5 hrs 20 mins	<1	3 hrs 37 mins 9 secs	0	1	1
Microsoft Corporation	1	2,284	22 wks 4 days	6	1 hrs 41 mins 9 secs	0	0	0

Click on one of the selected publishers, and use the drill down method to gather more detailed information about your software assets.

Publisher	Total Computers	Total Runs	Total Time	Average Runs per Day	Average Run time	Used 1 week ago	Used 2 weeks ago
BigFix Inc.	1	121	1 wks 3 days 14 hrs	<1	2 hrs 10 mins 23 secs	0	1
Computer Associates Internation...	1	28	4 days 5 hrs 20 mins	<1	3 hrs 37 mins 9 secs	0	1
Microsoft Corporation	1	2,284	22 wks 4 days	6	1 hrs 41 mins 9 secs	0	0

Software title	Total Computers	Total Runs	Total Time	Average Runs per Day	Average Run time	Used 1 week ago	Used 2 weeks ago
eTrust Antivirus	1	28	4 days 5 hrs 20 mins	<1	3 hrs 37 mins 9 secs	0	1

Application	Total Computers	Total Runs	Total Time	Average Runs per Day	Average Run time	Used 1 week ago	Used 2 weeks ago
eTrust Antivirus 7.	1	28	4 days 5 hrs 20 mins	<1	3 hrs 37 mins 9 secs	0	1

8. Export

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

Resources

Advanced Features

- **Advanced filtering**

In the *Filters & Columns* settings for each report type, you specify the settings for your view. Typically you identify a property (e.g. IP address), the operator (e.g. contains), and then you enter in the desired value (e.g. 192).

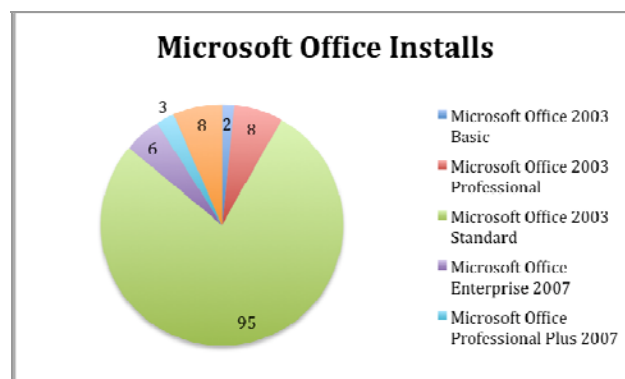
You may use the “%” symbol as wildcards for values, and you may use the “AND” and “OR” operators between values for advanced filtering. For example *Operating System contains %2003 OR mac%*.

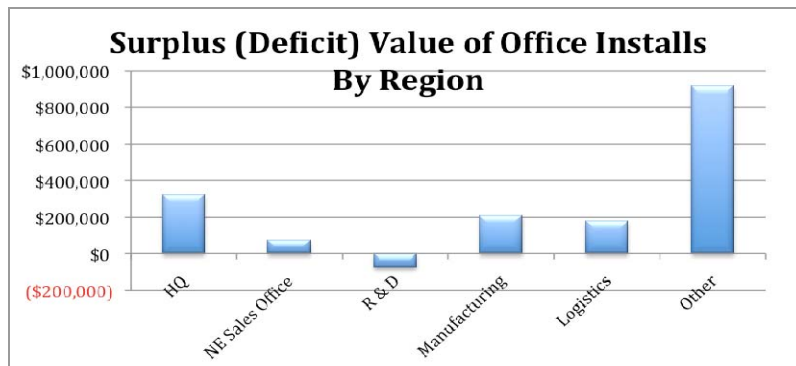
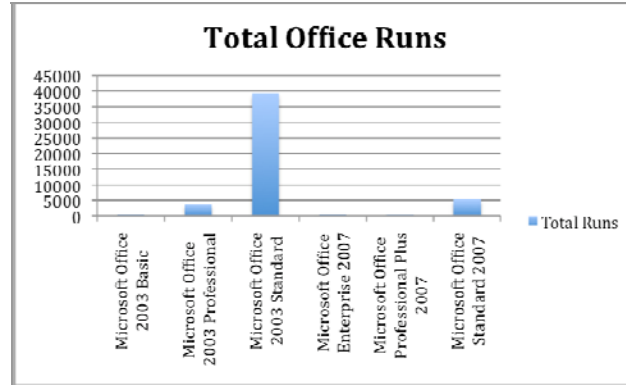
- **Exporting a report and generating charts in Excel**

DSS SAM 1.1 does not contain any native charting functions. To generate charts, you should generate the desired data using DSS SAM columns and filters, export the data to a .CSV, and use a spreadsheet tool like Microsoft Excel to generate your charts.

For example, export this view to a .CSV to generate some interesting charts:

Software Asset Hierarchy			
All > Microsoft Corporation > Microsoft Office			
Software title version	Total Computers	Total Runs	
Microsoft Office 2003 Basic	2	336	
Microsoft Office 2003 Professional	8	3734	
Microsoft Office 2003 Standard	95	39128	
Microsoft Office Enterprise 2007	6	546	
Microsoft Office Professional Plus 2007	3	245	
Microsoft Office Standard 2007	8	5130	





- **How do I add custom information about my IT assets, like asset tags, or rack locations for computers in DSS SAM?**

The BigFix platform is an extremely flexible tool for exploring information about your IT assets. The BigFix agent installed on your computers can be instructed to do many things, including look at attributes of the computer and report back what it sees. Using BigFix, you can generate data like “soft asset tags”, geographic locations, or rack locations for computers listed in DSS SAM. For this type of data, you would first create files or registry entries that reside on each computer with the information you want to retrieve (you can use BigFix tasks to create the files or registry entries). Then you create BigFix analysis properties to report this data to your BigFix and DSS SAM server.

For example:

- 1) Create a task that generates a custom file for each computer. This file might contain things like provisioned date, vendor, procurement data, rack location, geographic location, asset tag.
- 2) Create a BigFix analysis that reports the various entries in the file that you automatically created on every computer.
- 3) Add the new BigFix analysis properties to DSS SAM as stored Computer Properties.

This simple process allows you to customize and control the asset data DSS SAM reports about your computers that may not be available out of the box from BigFix.

FAQs

When importing content for a Contract from a .CSV file, will the application automatically create new columns to match my .CSV file?

No - If there are any additional columns specified in the CSV that are not present in the contract model, they will be ignored. (The import process will not create them.)

What kinds of User Accounts should I set up for my deployment?

Ideally you will have one domain user account with the following permissions:

- Permission to install the application on your DSS SAM server
- Permission to connect to your database server and create databases
- Permission to connect to your BES database and read data
- Permission to read data from the BES server upload manager directory

Read more about User Accounts in the DSS SAM *Installation and Configuration Guide*.

How do I create a Saved Report?

Through the *Save As* button located under all of the tabs in DSS SAM.

Additional Documentation

This User's Guide is part of the DSS SAM Documentation Toolkit. Other documents within the kit include:

- **Installation and Configuration Guide** – A detailed guide on the installation and configuration of the DSS SAM application.
- **End User QuickStart** – A 1-page guide to help you quickly get started using DSS SAM 1.1.
- **Software Catalog Editor's Guide** – Detailed information about how to use and customize your Catalog, and how to make it match the software in your deployment.
- **Software Catalog Visual Guide** – A graphic depiction of the various parts and functionality of the DSS SAM Software Catalog.
- **Implementation Guide** – A general pre- or post-purchase guide on Software Asset Management concepts, Best Practices, strategies, and ROI metrics.
- **System Requirements** – A 1-page listing of the hardware and software requirements for using DSS SAM, as well as deployment guidelines and information on user accounts.
- **Release Notes** – A listing of the current Known Issues including descriptions and workarounds, along with System Requirements and Support information.

Global Support

BigFix offers a suite of support options to help optimize your user-experience and success with this product. Here's how it works:

- 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