



**IBM SmartCloud Control Desk 7.5
IT Asset Management Fundamentals
Student Exercises**

Course: TP380 ERC: 1.0

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No student exercises are provided for this unit.

Student exercises for Unit 1

Student exercises for Unit 2

There are many facets to managing software and hardware through its lifecycle, and many different ways to interact with the hardware and software. In the exercises for the asset lifecycle units of this course, you create and manipulate the hardware in the order that is defined by the lifecycle. Thus, the exercises for units 2 through 6 of this course are dependent; that is, each set of exercises builds on the previous set. During these exercises, you log in as a different user to demonstrate the various IT asset management roles.

As you go through the exercises in these units, be aware that each exercise might affect the subsequent ones. Carefully follow the directions to ensure that you can successfully complete the subsequent exercises.

Image information

This course includes two virtual images. The first image is a virtual image that has IBM SmartCloud Control Desk installed. You use this image for the first seven units of the course. This image is a 64-bit Microsoft Windows 2003 Standard Server. If you need help starting the guest or accessing the operating system login screen, ask your instructor or consult the instructions that you received when you registered for this course.



Note: When running this image locally, the host computer must support 64-bit virtual machines. Most new computers can support 64-bit virtual machines. However, you might have to enable the virtualization technology in your bios. For more details, read the following VMware Knowledge Base article:

http://kb.vmware.com/selfservice/microsites/search.do?language=en_US&cmd=displayKC&externalId=1003944

The second image is a virtual image that has IBM Tivoli Asset Discovery for Distributed installed. It is also a 64-bit Microsoft Windows 2003 Standard Server. You use this image for the Unit 8 exercises. You do not need to start this image until you reach the Unit 8 exercises. The steps for working with this image are detailed in the exercises for Unit 8.

Exercise 2-1: Logging in to the IBM SmartCloud Control Desk image

- ___ 1. At the windows login screen, press Ctrl+Alt+Delete.



Note: A different key sequence or menu selection might be used, depending on your environment. For example, when running a virtual machine on a Windows host, you might press Ctrl+Alt+Insert to access the login screen on the virtual machine.

- ___ 2. Enter the user name **Administrator** and password **object00**.
- ___ 3. Click **OK** to log in to Windows 2003.

Exercise 2-2: Verifying image network configuration

The image for this course is designed to use the static IP address of **192.168.1.210** with the host name **itracr.tivoli.edu**. Changing the IP address or host name can cause the software not to operate correctly. In this exercise, you verify the network configuration of the system that you are using.

- ___ 1. Double-click the command prompt icon on the desktop.
- ___ 2. Type the following command:
`ping itracr.tivoli.edu`
- ___ 3. Verify that the fully qualified host name can be resolved.

It is successful when you receive a reply.

```
cmd Command Prompt
Microsoft Windows [Version 5.2.3790]
(C) Copyright 1985-2003 Microsoft Corp.

C:\Documents and Settings\Administrator>ping itracr.tivoli.edu

Pinging itracr [192.168.1.210] with 32 bytes of data:
Reply from 192.168.1.210: bytes=32 time<1ms TTL=128

Ping statistics for 192.168.1.210:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
    Approximate round trip times in milli-seconds:
        Minimum = 0ms, Maximum = 0ms, Average = 0ms

C:\Documents and Settings\Administrator>
```

- ___ 4. Repeat the test with the following commands. All commands must receive a reply.

```
ping itracr  
ping 192.168.1.210
```



Note: If you do not receive a reply, your operating system is not configured correctly, either by a misconfigured network card or IP stack. Correct the virtual machine configuration. If you are using this system in a classroom or supported lab environment, contact your instructor or lab support personnel.

- ___ 5. Close the command prompt.

Exercise 2-3: Starting IBM SmartCloud Control Desk

The IBM SmartCloud Control Desk services are configured for a manual start on the class image. Batch files are provided to start and stop the services as needed. The batch file starts Tivoli Directory Server, WebSphere Application Server, and the IBM SmartCloud Control Desk application server (MXServer). In this exercise, you start the server.

- ___ 1. Open **Windows Services**. A shortcut is on the desktop.
- ___ 2. Verify that the **DB2 - DB2COPY1 - CTGINST1-0** service is started. If it is not, start it.
- ___ 3. Close **Windows Services**.
- ___ 4. Double-click the **Start IBM SmartCloud Control Desk** shortcut on the desktop. It takes a few minutes for all the processes to start.
- ___ 5. When the script completes, verify that the MXServer is open for e-business.

```
cn Start IBM SmartCloud Control Desk
The IBM Tivoli Directory Server Instance U6.3 - idscmdb service is starting.
The IBM Tivoli Directory Server Instance U6.3 - idscmdb service was started successfully.

ADMU0116I: Tool information is being logged in file C:\Program
  Files\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\nodeagent\sta
rtServer.log
ADMU7701I: Because nodeagent is registered to run as a Windows Service, the
  request to start this server will be completed by starting the
  associated Windows Service.
ADMU0116I: Tool information is being logged in file C:\Program
  Files\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\nodeagent\sta
rtServer.log
ADMU0128I: Starting tool with the ctgAppSrv01 profile
ADMU3100I: Reading configuration for server: nodeagent
ADMU3200I: Server launched. Waiting for initialization status.
ADMU3000I: Server nodeagent open for e-business; process id is 6316
ADMU0116I: Tool information is being logged in file C:\Program
  Files\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\MXServer\star
tServer.log
ADMU0128I: Starting tool with the ctgAppSrv01 profile
ADMU3100I: Reading configuration for server: MXServer
ADMU3200I: Server launched. Waiting for initialization status.
ADMU3000I: Server MXServer open for e-business; process id is 7004

Press any key to continue . . .
```

- ___ 6. Press Enter to close the command prompt.

- ___ 7. Open Internet Explorer.

The console logon window is displayed. It is configured as the home page. If you encounter an internal error, wait a few more minutes for the application server to load.



Note: The home page for Internet Explorer is <http://itracr/maximo>. A bookmark called **IBM SmartCloud Control Desk Console** is also available. The default web address for the console is <http://hostname/maximo>.

Exercise 2-4: Creating an item record for a nonrotating asset

In this exercise, you create a nonrotating (consumable) item record, printer toner cartridge, into the ITHardware storeroom. This toner is treated as an item because its cost is low and it does not need to be managed throughout its lifecycle. However, keeping track of the toner in inventory helps you determine when it needs to be reordered.

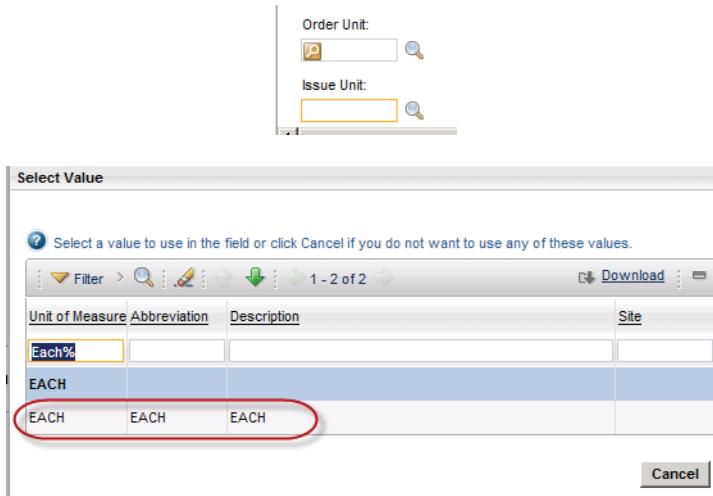
- ___ 1. Log in to the console as **elmo** with the password **object00**. Elmo is an inventory administrator.
- ___ 2. Click **Inventory > Item Master** in the navigation bar.
- ___ 3. Click the **New Item** icon.
- ___ 4. Enter the following information to define the item record for the ethernet switch.

| Field | Value |
|-------------|--|
| Item | XeroxHCToner |
| Description | Xerox High-Capacity Toner cartridge 4100 pages |
| Order Unit | EACH |
| Issue Unit | EACH |

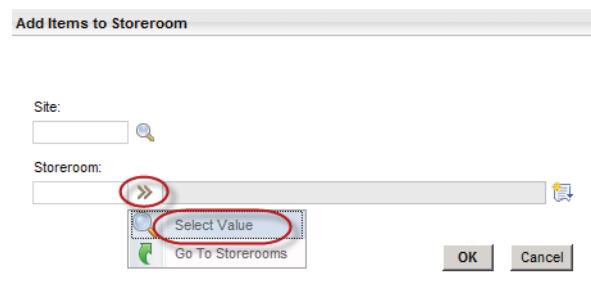


Note: When you enter **EACH** for the units, a Search icon is displayed in the field. This condition occurs because there are two units of measure that are defined for the value EACH in the demonstration data. Click the **Search** icon and select the instance with the abbreviation EACH. You must perform this step every time you enter EACH for the unit of measure.

- ___ 5. Click **Add/Modify Image** under More Actions in the navigation bar.



- ___ 6. Click **Browse** and select E:\LabFiles\ITAsset\xeroxtoner.jpg.
___ 7. Click **Open** and then **OK** to add the graphic to the item.
___ 8. Click **Add Items To Storeroom** under More Actions in the navigation bar.
___ 9. Click the **Detail Menu** icon for the Storeroom field and click **Select Value**.



- ___ 10. Click **ITHardware** and click **OK**.

- ___ 11. Enter the following storeroom values.

| Field | Value |
|-----------------|---------|
| Issue Cost Type | AVERAGE |
| Unit Cost | 55.00 |
| Current Balance | 5 |

The screenshot shows a software interface titled 'Add Items to Storeroom'. At the top, there's a header 'Storeroom Information' with a 'Filter' button and a message '1 - 1 of 1'. Below the header is a table with columns: Item, Issue Cost Type, Unit Cost, Default Bin, Current Balance, Lot, Issue Unit, Order Unit, and Site. A single row is selected with the values: XEROXHCTON, AVERAGE, 55.00, (empty), 5, (empty), EACH, EACH, and PMSCRTP. At the bottom right are 'OK' and 'Cancel' buttons.

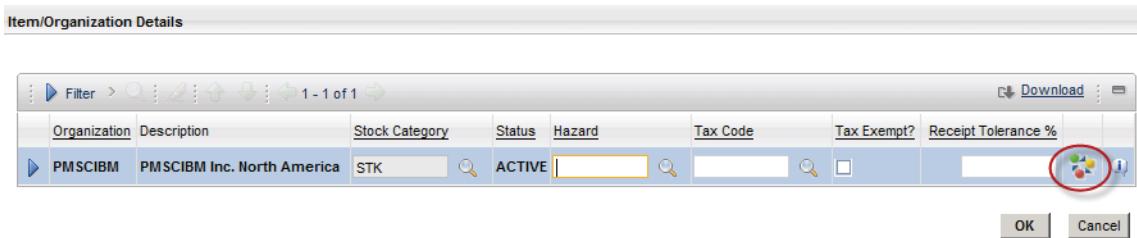
- ___ 12. Click **OK** to add the item to the storeroom and increment the inventory balance to **5**.
- ___ 13. Click the **Change Status** icon and set the status to **Active**.
- ___ 14. Select the **Roll New Status to Organization and Inventory** option and click **OK**.

The screenshot shows a 'Change Status' dialog box. It has fields for 'Item' (XEROXHCTON, Xerox High-Capacity Toner cartridge 4100 pages) and 'Status' (PENDING, Pending). Below these, there's a dropdown for 'New Status' with 'Active' selected. A checkbox labeled 'Roll New Status to Organizations and Inventory?' is checked. At the bottom are 'OK' and 'Cancel' buttons.

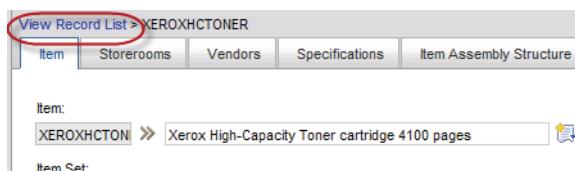


Note: You can use the **Roll New Status to Organization and Inventory** option to control when the item is made available for use by organizations and viewable in inventory for those organizations. This feature is important when you are in a multiple organization implementation. If you do not select the **Roll New Status to Organization and Inventory** option when changing the status, the item status is not updated at the organization level. Therefore, even if you set the status to active, the users in the organizations cannot use the item to create asset records because the status at the organization is set to pending. To individually change the status for organizations, click **Item/Organization Details** under More Actions in

the navigation bar. In Item/Organization Details, you can change the item status for each organization that uses the Item Set where the item is stored.



_____ 15. Click **View Record List** to return to the list of items. This link is above the tabs.



Tip: If you do not see a tab, button, or link that you are instructed to click, you might have to scroll vertically or horizontally in the view to find it.

- _____ 16. Place your cursor in the Item field and press Enter to view a list of all items.
- _____ 17. Review the list. Notice that there are rotating items, software items, and nonrotating items.
- _____ 18. Verify that the new **XeroxHCToner** item is in the list. You might have to go to the second page of items.

Exercise 2-5: Creating an item record for a rotating item

When you have an asset, such as a notebook, with a value that you want to track through its lifecycle, you define it as a rotating asset. Rotating items are templates that can be used to create rotating assets. This exercise demonstrates how to create a rotating item.

- _____ 1. Verify that you are in the Item Master application. If you are not, click **Inventory > Item Master** in the navigation bar.
- _____ 2. Click the **New Item** icon.

- ___ 3. Enter the following information to define the item record for the notebook.

| Field | Value |
|--------------------|----------------------|
| Item | W510 |
| Description | W510 notebook |
| Order Unit | Each |
| Issue Unit | Each |
| Rotating | [Selected] |
| Inspect on Receipt | [Selected] |
| Refresh Cycle | 48 months |

The screenshot shows the 'View Record List > W510' screen. The top navigation bar includes tabs for Item, Storerooms, Vendors, Specifications, Item Assembly Structure, and Price Books. The main area displays item details for 'W510' (description: 'W510 notebook'). Under the 'Attachments' section, there is a placeholder for an image with a red 'X'. On the right, there are several checkboxes with red circles around them: 'Rotating?' and 'Inspect on Receipt?'. Other checkboxes like 'Condition Enabled?', 'Kit?', 'Capitalized?', 'Add as Spare Part?', 'Attach to Parent Asset on Issue?', 'Software?', and '* Tax Exempt?' are also present but not circled.

- ___ 4. Click **Add/Modify Image** under More Actions in the navigation bar.
- ___ 5. Click **Browse** and select E:\LabFiles\ITAsset\w510.jpg.
- ___ 6. Click **Open** and then **OK** to add the graphic to the item.
- ___ 7. Click **Add Items To Storeroom** under More Actions in the navigation bar.
- ___ 8. Click the **Detail Menu** icon for the Storeroom field and click **Select Value**.
- ___ 9. Click **ITHardware** and click **OK**.

- ___ 10. Leave the Cost and Current Balance fields blank and click **OK**.

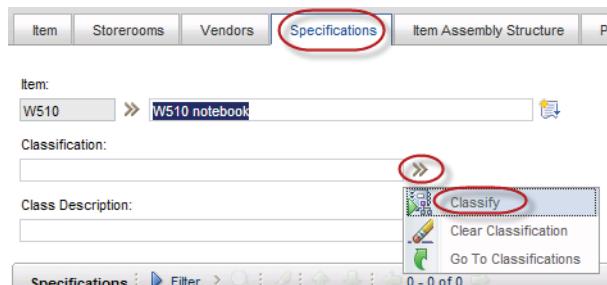


- ___ 11. Click the **Change Status** icon and set the status to Active.
___ 12. Select the **Roll New Status to Organization and Inventory** option and click **OK**.

Exercise 2-6: Applying classification and specifications

This exercise demonstrates how to classify an item. By classifying the item, you can define the default specifications for assets records that are linked to the item.

- ___ 1. Verify that you are viewing the **W510** item record. If you are not, click **Inventory > Item Master** in the navigation bar and find and open the **W510** item record.
___ 2. Click the **Specifications** tab.
___ 3. Click the **Detail Menu** icon for the Classification field.
___ 4. Select **Classify**.



- ___ 5. Expand **IT:Information Technology > COMPUTER SYSTEM: Computer System**.
___ 6. Click **LAPTOP COMPUTER:Laptop Computer** to select it.

The Classification field is populated with **IT \ COMPUTER SYSTEM \ LAPTOP COMPUTER.**



- ___ 7. Enter the following information in the Specifications pane. Press the Tab key or use the cursor to move to the next field. Do *not* press the Enter key. Pressing the Enter key adds a blank row. If you accidentally add a blank row, you must delete it before you can save the record.

| Attribute | Value | Unit of Measure |
|-----------|-------|-----------------|
| PRCTYPE | i7 | Leave blank |
| PRCSPEED | 2.6 | GHZ |
| DRIVSIZE | 500 | GBYTE |
| MEMORY | 8 | GBYTE |

| Attribute | Description | Value | Unit of Measure |
|-----------|------------------|-------|-----------------|
| PRCTYPE | Processor Type | i7 | |
| PRCSPEED | Processor Speed | 2.6 | GBYTE |
| PRCCOUNT | Processor Count | | |
| DRIVSIZE | Hard Drive Size | 500.0 | GBYTE |
| DISKTYPE | Disk Type | | |
| OPSYS | Operating System | | |
| MEMORY | Memory | 8.0 | GBYTE |



Note: You can manage the available units of measure by using the **Add/Modify Units of Measure** under More Actions in the navigation bar.

- ___ 8. Click the **Save Item** icon.
___ 9. Click **View Record List** to return to the list of items.

Exercise 2-7: Building an item assembly structure

This exercise demonstrates how you can build an item assembly structure. Item assembly structures can be used to define assets that are part of another item. In this exercise, you build the Item Assembly Structure (IAS) for the W510 item. The W510 item always includes a monitor and a port replicator.

- ___ 1. Verify that you are in the Item Master application. If you are not, click **Inventory > Item Master** in the navigation bar.
- ___ 2. Click the **New Item** icon.
- ___ 3. Enter the following information to define the item record for the port replicator.

| Field | Value |
|-------------|-----------------------------------|
| Item | S3Port_Replicator |
| Description | Thinkpad Series 3 Port Replicator |
| Order Unit | EACH |
| Issue Unit | EACH |

- ___ 4. Click **Add/Modify Image** under More Actions in the navigation bar.
- ___ 5. Click **Browse** and select E:\LabFiles\ITAsset\port_replicator_series3.jpg.
- ___ 6. Click **Open** and then **OK** to add the graphic to the item.
- ___ 7. Click **Add Items To Storeroom** under More Actions in the navigation bar.
- ___ 8. Click the **Detail Menu** icon for the Storeroom field and click **Select Value**.
- ___ 9. Click **ITHardware** and click **OK**.

- ___ 10. Enter the following storeroom values.

| Field | Value |
|-----------------|---------|
| Issue Cost Type | AVERAGE |
| Unit Cost | 180 |
| Current Balance | 10 |

Add Items to Storeroom

Storeroom Information | Filter | 1 - 1 of 1 | Download |

| Item | Issue Cost Type | Unit Cost | Default Bin | Current Balance | Lot | Issue Unit | Order Unit | Site |
|-------------|-----------------|-----------|-------------|-----------------|-----|------------|------------|---------|
| S3PORT_REPL | AVERAGE | 180.00 | | 10.00 | | EACH | EACH | PMSCRTP |

OK | Cancel

- ___ 11. Click **OK** to add the item to the storeroom.
- ___ 12. Click the **Change Status** icon and set the status to **Active**.
- ___ 13. Select the **Roll New Status to Organization and Inventory** option and click **OK**.
- ___ 14. Click **View Record List** to return to the list of items.
- ___ 15. Find and open the **W510** item record.
- ___ 16. Click the **Item Assembly Structure** tab.
- ___ 17. Click **New Row** in the Children section.

- ___ 18. Enter **ITAMMONITOR** in the Item field.

The screenshot shows the 'Item Assembly Structure' tab selected in a navigation bar. Below it, a form is displayed with fields for 'Top Level Item' (W510) and 'Current Level' (W510). A 'Belongs To' field is empty. A 'Remarks' field contains a link. A table titled 'Children' shows one row: ITAMMONITOR > computer display with a quantity of 1.00. In the 'Details' section, a new row is being added for S3PORT_REPL, with the item field circled in red. The 'New Row' button at the bottom right is also circled in red.

- ___ 19. Click **New Row**.

- ___ 20. Enter **S3Port_Replicator** in the Item field.

The screenshot shows the 'Item Assembly Structure' screen with two items listed in the 'Children' table: ITAMMONITOR > computer display and S3PORT_REPL > Thinkpad Series 3 Port Replicator. In the 'Details' section, the item field for the new row is circled in red, and the 'New Row' button at the bottom right is also circled in red.

- ___ 21. Click the **Save Item** icon.

- ___ 22. Sign out of the console.

Exercise 2-8: Creating a company master record

Company master records contain information about companies with which you do business. This information includes the default contact person for the company, the currency used, billing

information, and contact information such as address and phone number. All company master records in the database belong to a company set. With company sets, you can share information about companies between multiple organizations. Each organization is associated with a company set. The company set has an option called **Automatically Add Companies to Company Master**. If this option is cleared, you must create a company master before creating the company record. Company records are managed in the Companies application. This exercise demonstrates how to create a company master record.

- ___ 1. Log in to the console as **arun** with the password **object00**. Arun is a financial analyst.
- ___ 2. Click **Purchasing > Company Master** in the navigation bar.
- ___ 3. Click the **New Company Master** icon.
- ___ 4. Enter the following information to define the asset.

| Field | Value |
|--------------|-----------------------|
| Company | COMPWLD |
| Description | Computer World |
| Company Type | V |

The screenshot shows the 'View Record List > COMPWLD' page. At the top, there are tabs for 'Company Master', 'Contacts', and 'Addresses'. Below the tabs, there are several input fields:

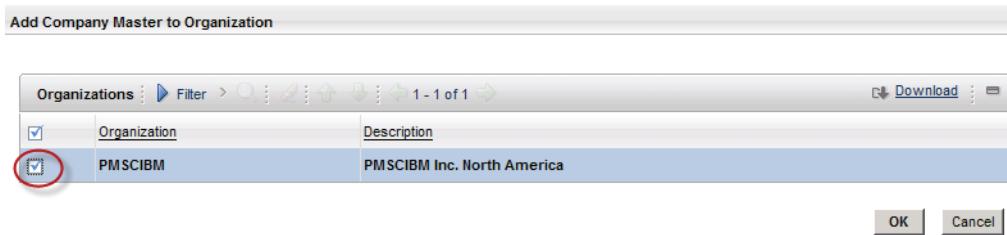
- * Company: COMPWLD (highlighted in yellow)
- Description: Computer World
- Customer #: (empty text box)
- Home Page: (empty text box)
- Company Set: PMSCCS1
- Company Type: V (highlighted in yellow)
- Update Related Companies? (checkbox)



Note: The company type **V** is for Vendor. To view a list of other company types, you can click the Select Value icon for the Company Type field.

- ___ 5. Click the **Save Company Master** icon.
- ___ 6. Click **Add Company Master to Organization** under More Actions in the navigation bar.

- ___ 7. Select the **PMSCIBM** organization and click **OK**.



- ___ 8. Click **OK** to dismiss the system message.

Exercise 2-9: Updating a company record

After you create the record, you can manage the company records in the Companies application. The company records contain organization-specific information about vendors, such as contact names and addresses. Company information must be defined in the Companies application so that other applications, such as Inventory and Purchasing, can access the information. You can also use the Companies application to define branches for a company. This exercise demonstrates how to define the organization-specific information for the company record that you created.



Note: The company set, PMSCCS1, which is defined in the demonstration data, does not have the **Automatically Add Companies to Company Master** option selected. Therefore, companies cannot be created in the Companies application. You must create a Company Master record first in the Company Master application.

- ___ 1. Click **Go To Applications > Purchasing > Companies** in the navigation bar.
- ___ 2. Press Enter to view a list of all companies.
- ___ 3. Open the **COMPWLD** company. The company record was created when you created the Company Master.
- ___ 4. Click the **Contacts** tab.

- ___ 5. Click **New Row** and enter the following values to define the contact.

| Field | Value |
|--------------|---------------------------|
| Contact | Kurt Smith |
| Position | Clerk |
| E-mail | ksmith@compwld.com |

The screenshot shows the 'Contacts' tab selected in the navigation bar. The 'Company' dropdown is set to 'COMPWLD'. The 'Organization' dropdown is set to 'PMSCIBM'. The main area displays a single contact entry for 'Kurt Smith' with the position 'Clerk' and email 'ksmith@compwld.com'. Below the contact list is a 'Details' section with fields for Contact, Position, E-mail, Phone, Fax, Pager Phone, and Home Phone.

- ___ 6. Click the **Save Company** icon.
 ___ 7. Click the **Addresses** tab.
 ___ 8. Click the **Select Value** icon for the Customer Contact field and click **Kurt Smith** to add him as the customer contact.

The screenshot shows a 'Select Value' dialog box for the 'Customer Contact' field. The contact 'Kurt Smith' is listed and highlighted with a red circle around it. The dialog has a 'Cancel' button at the bottom right.

- ___ 9. Click the **Select Value** icon for the Contact field and click **Kurt Smith** to add him as the contact for Remit to Information.

- ___ 10. Enter the following values in the Remit to Information pane.

| Field | Value |
|---------|----------------------|
| Address | 69 Harris St. |
| City | Adams |
| State | MA |
| Zip | 01220 |

The screenshot shows the 'Remit To Information' pane with the following fields filled in:

- Contact: Kurt Smith
- Address: 69 Harris St.
- City: Adams
- State/Province: MA
- ZIP/Postal Code: 01220

- ___ 11. Click the **Save Company** icon.
- ___ 12. Click the **Branches** tab.
- ___ 13. Click **New Row**.
- ___ 14. Enter **COMPDEPOT** for the Company. Computer Depot is now a branch of Computer World.

The screenshot shows the 'Branches' tab of the company record. The 'Company' field is set to COMPWLD and the 'Description' field is set to Computer World. A new row is being added, with the 'Company' field set to COMPDEPOT and the 'Description' field set to Computer Depot. The 'Use Parent Remit To?' checkbox is checked.

- ___ 15. Click the **Save Company** icon.

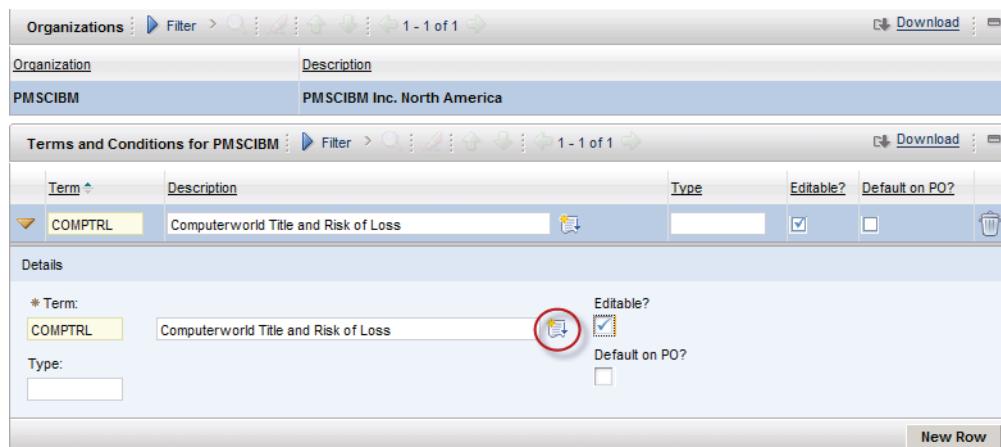
Exercise 2-10: Creating terms and conditions

This exercise demonstrates how to create terms and conditions. You can create one terms and conditions record that can be applied to multiple contracts. You apply them to a contract in the next exercise.

- ___ 1. Click **Go To Applications > Contracts > Terms and Conditions** in the navigation bar.
- ___ 2. With **PMSCIBM** organization selected, click **New Row**.
- ___ 3. Enter the following information to define the terms and conditions.

| Field | Value |
|----------------|---|
| Term | COMPTRL |
| Description | Computerworld Title and Risk of Loss |
| Editable? | [Selected] |
| Default on PO? | [Cleared] |

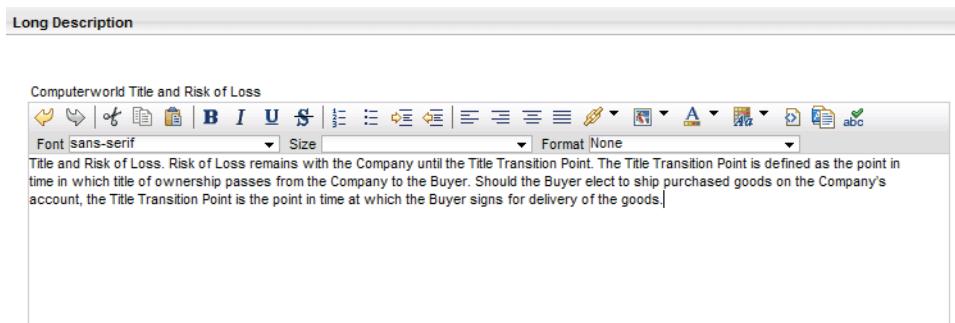
- ___ 4. Click the **Long Description** icon.



- ___ 5. Enter the following Long Description.

Title and Risk of Loss. Risk of Loss remains with the Company until the Title Transition Point. The Title Transition Point is defined as the point in time in which title of ownership passes from the Company to the Buyer. Should the Buyer elect to ship purchased goods on the Company's account, the Title Transition Point is the point in time at which the Buyer signs for delivery of the goods.

- ___ 6. Click **Check Spelling** icon and correct any spelling errors that you might have made.



- ___ 7. Click **OK** to add the long description.
 ___ 8. Click the **Save Terms and Conditions** icon.

Exercise 2-11: Creating a lease contract

This exercise demonstrates how to create a lease contract for a server.

- ___ 1. Click **Go To Applications > Contracts > Lease/Rental Contracts** in the navigation bar.
 ___ 2. Click **New Lease/Rental Contract**.
 ___ 3. Write down the lease/rental contract number: _____

The screenshot shows a software interface for viewing a record. At the top, it says 'View Record List > 1027'. Below that, there are three tabs: 'Contract', 'Properties', and 'Contracts'. The 'Contract' tab is selected. Under the 'Contract' tab, there is a field labeled '* Contract:' with the value '1027' highlighted. Below that is a 'Revision:' field with the value '0'.



Note: The contract number is automatically generated. Your contract number might not match the screen capture. Write down the number that is generated for you.

- ___ 4. Type **Notebook Lease Agreement for training classes** in the Description field.
 ___ 5. Enter the following information to define the Contract.

| Field | Value |
|------------|------------------------------|
| Start Date | [Today's date] |
| End Date | [4 months from Today's date] |

| Field | Value |
|--------------------|--|
| Company | COMPWLD |
| Term in Months | 4 |
| Number of Payments | 4 |
| Payment Period | <i>[First day of every month at 5:00 p.m.]</i> |



Note: To set the payment period, click the **Calendar** icon next to the payment period field. Select **Every ___ month(s)** and enter **1**. Select on day **01** at time **17:00:00**. Click **OK**.

The screenshot shows a configuration dialog for setting a payment period. It includes various options for frequency (second(s), minute(s), hour(s), day(s), week(s), month(s), year(s)) and specific date/time settings (on day 01 at 17:00:00, on the first Sunday of the month, etc.). The 'Every 1 month(s)' option is selected, and the 'on day 01 at time 17:00:00' option is also selected.

- ___ 6. Click the **Save Lease/Rental Contract** icon.
- ___ 7. Click the **Contract Lines** tab.
- ___ 8. Click **New Row**.

- ___ 9. Enter the following information to indicate the items in the contract.

| Field | Value |
|---------------------|-------------|
| Item | W510 |
| Line Cost | 1200 |
| Lease End Value | 1100 |
| Order Unit | EACH |
| Inspection Required | [Selected] |
| Delivery Time | 5 |

The screenshot shows the 'Contract Lines' section of the IBM SmartCloud Control Desk. At the top, there are buttons for 'LEASE' and 'DRAFT'. Below that, revision information (Revision: 0), organization (PMSCIBM), and total cost (1,200.00) are displayed. The 'Contract Lines' grid shows one item: W510 notebook. The details for this item include:

| Item | Description | Lease End Value | Line Cost |
|------|---------------|-----------------|-----------|
| W510 | W510 notebook | 1,100.00 | 1,200.00 |

Below the grid, the 'Line Details' panel contains the following fields:

- * Contract Line: 1
- * Item: W510
- Line Cost: 1,200.00
- Lease End Value: 1,100.00
- Commodity Group: (empty)
- Commodity Code: (empty)
- * Order Unit: EACH
- Manufacturer: (empty)
- Catalog #: (empty)
- Model: (empty)
- Inspection Required? (checkbox checked)
- Delivery Time: 5
- Line Status: DRAFT

- ___ 10. Click the **Save Lease/Rental Contract** icon.
 ___ 11. Click the **Terms and Conditions** tab.
 ___ 12. Click **New Row**.

- ___ 13. Enter **COMPTRL** in the Term field.

| Sequence | Term | Description | Send to Vendor? |
|----------|---------|--------------------------------------|-------------------------------------|
| 10 | COMPTRL | Computerworld Title and Risk of Loss | <input checked="" type="checkbox"/> |

Details

Sequence:
10

Term:
COMPTRL

Send to Vendor?

[Select Terms](#) | [New Row](#)

- ___ 14. Click the **Save Lease/Rental Contract** icon.
- ___ 15. Click **Authorize Sites** under More Actions in the navigation bar.
- ___ 16. Click **Select Sites** and select **PMSCRTP**.

| Site | Description | Organization | Address |
|---|--|--------------|---------|
| <input checked="" type="checkbox"/> PMSCRTP | PMSCRTP MA Site of PMSC Inc. North America | PMSCIBM | HQ |

[OK](#) | [Cancel](#)

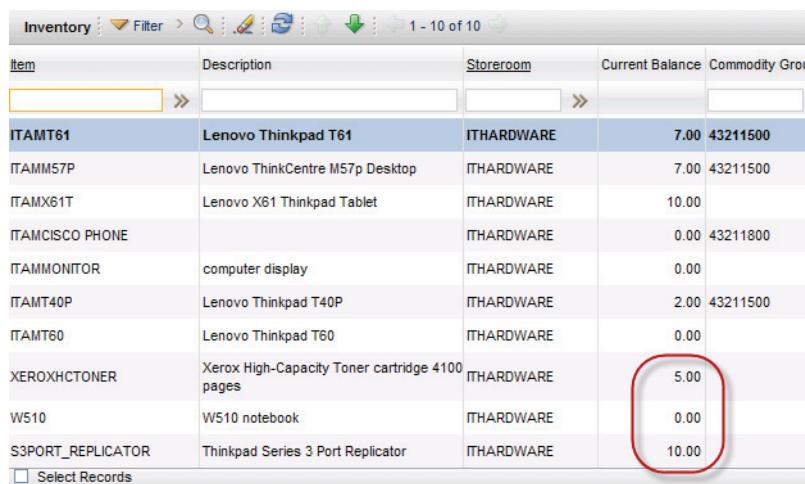
- ___ 17. Click **OK** to add the site to the authorized list.
- ___ 18. Click **OK** to authorize the site.
- ___ 19. Click the **Change Status** icon and set the Status to **Approved**.
- ___ 20. Sign out of the console.

Exercise 2-12: Working with items in inventory

This exercise demonstrates how to view item and asset records in the Inventory application. It also demonstrates how to configure reorder details for an inventory item.

- ___ 1. Log in to the console as **elmo** with the password **object00**.
- ___ 2. Click **Inventory > Inventory** in the navigation bar.

- ___ 3. Press Enter to view a list of all items in inventory.
- ___ 4. Review the counts in the **Current Balance** column. Specifically, focus on the counts for the items that you created. The toner count is 5, the W510 is 0, and the port replicator count is 10. Remember, when you added these items to the storeroom, you specified a current balance for the toner and the port replicator, but not the W510 notebook.



| Item | Description | Storeroom | Current Balance | Commodity Group |
|-------------------|--|-------------|-----------------|-----------------|
| ITAMT61 | Lenovo Thinkpad T61 | IT HARDWARE | 7.00 | 43211500 |
| ITAMM57P | Lenovo ThinkCentre M57p Desktop | IT HARDWARE | 7.00 | |
| ITAMX61T | Lenovo X61 Thinkpad Tablet | IT HARDWARE | 10.00 | |
| ITAMCISCO PHONE | | IT HARDWARE | 0.00 | 43211800 |
| ITAMMONITOR | computer display | IT HARDWARE | 0.00 | |
| ITAMT40P | Lenovo Thinkpad T40P | IT HARDWARE | 2.00 | 43211500 |
| ITAMT60 | Lenovo Thinkpad T60 | IT HARDWARE | 0.00 | |
| XEROXHCTONER | Xerox High-Capacity Toner cartridge 4100 pages | IT HARDWARE | 5.00 | |
| W510 | W510 notebook | IT HARDWARE | 0.00 | |
| S3PORT_REPLICATOR | Thinkpad Series 3 Port Replicator | IT HARDWARE | 10.00 | |

- ___ 5. Open the **ITAMX61T** item.
- ___ 6. Click the **Rotating Assets** tab.
The Rotating Assets tab shows a list of all assets that are associated with this item and the current locations of those assets.
- ___ 7. Click **View Record List** to return to the list of items in inventory.
- ___ 8. Find and open the **XeroxHCToner** item.
- ___ 9. Click the **Reorder Details** tab.

- ___ 10. Enter the following reorder values.

| Field | Value |
|-------------------------|------------|
| Reorder | [Selected] |
| Reorder Point | 5 |
| Lead Time (Days) | 1 |
| Economic Order Quantity | 10 |
| Primary Vendor | COMPDEPOT |

The screenshot shows the 'View Record List > XEROXHCTONER' screen. At the top, there are tabs: Inventory (selected), Reorder Details, Rotating Assets, and Where Used. Below the tabs, the item is identified as 'XEROXHCTONER' (Xerox High-Capacity Toner cartridge 4100 pages) and the site is 'PMSCRTP'. The storeroom is 'ITHARDWARE' (IT Hardware). The 'Reorder Details' section contains fields for Reorder? (checked), Reorder Point (5.00), Lead Time (Days) (1), Safety Stock (empty), Economic Order Quantity (10.00), and Order Unit (EACH). The 'Primary Vendor' section lists Computer Depot as the primary vendor, with fields for Manufacturer (empty), Model (empty), Catalog # (empty), Internal? (unchecked), Storeroom (empty), and Storeroom Site (empty).

- ___ 11. Click the **Save Inventory** icon.

- ___ 12. Sign out of the console.

Exercise 2-13: Creating a rotating asset record

This exercise demonstrates how to create a rotating asset record by using the item record as the template. It also covers how to import assets by using the quick configuration tool. The quick configuration tool is useful when you have a list of several assets to import. For example, you can use the quick configuration tool to import a list of assets that you received from a lease agreement. You learn how to create an asset by using the purchasing process in the next unit.

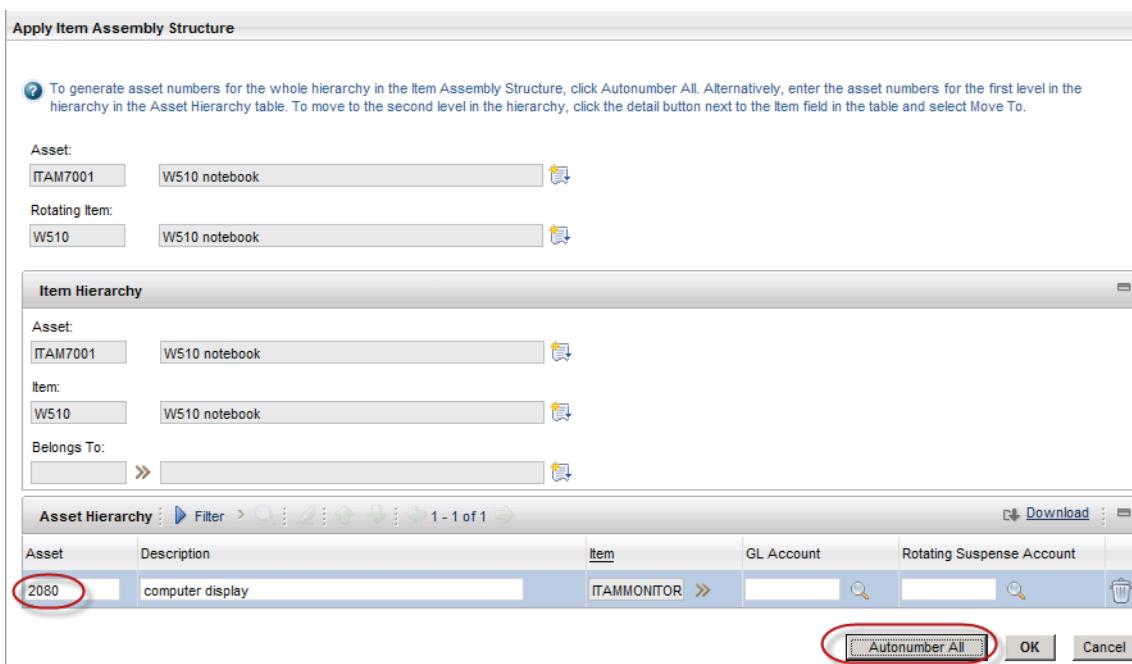
Creating a rotating asset in the Assets application

- ___ 1. Log in to the console as **jake** with the password **object00**. Jake is a hardware asset manager.
- ___ 2. Click **Assets > Assets** in the navigation bar.
- ___ 3. Click the **New Asset** icon.
- ___ 4. Enter the following information to define the asset.

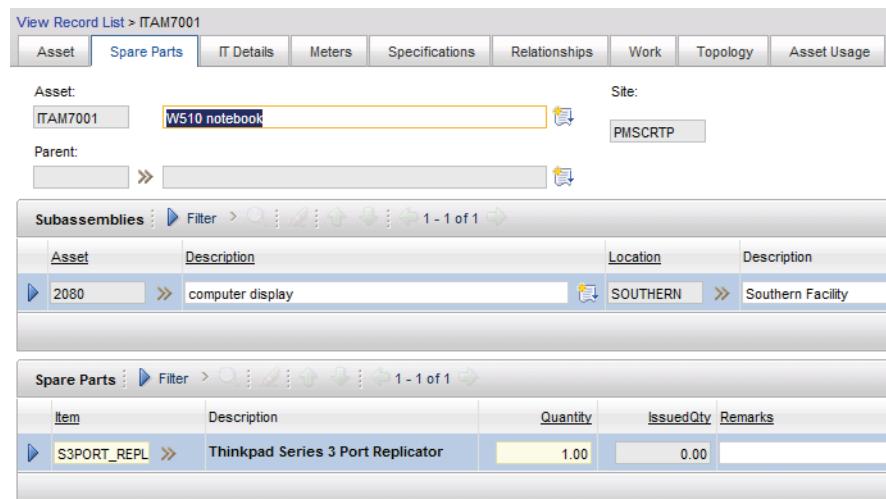
| Field | Value |
|---------------|-----------------------|
| Asset | ITAM7001 |
| Description | [Leave blank for now] |
| Type | IT |
| Location | SOUTHERN |
| Rotating Item | W510 |
| Serial # | DG5794 |

- ___ 5. Notice that the asset description defaults to the Item description entered in the Item Master application for the W510 item.
- ___ 6. Click the **Save Asset** icon.

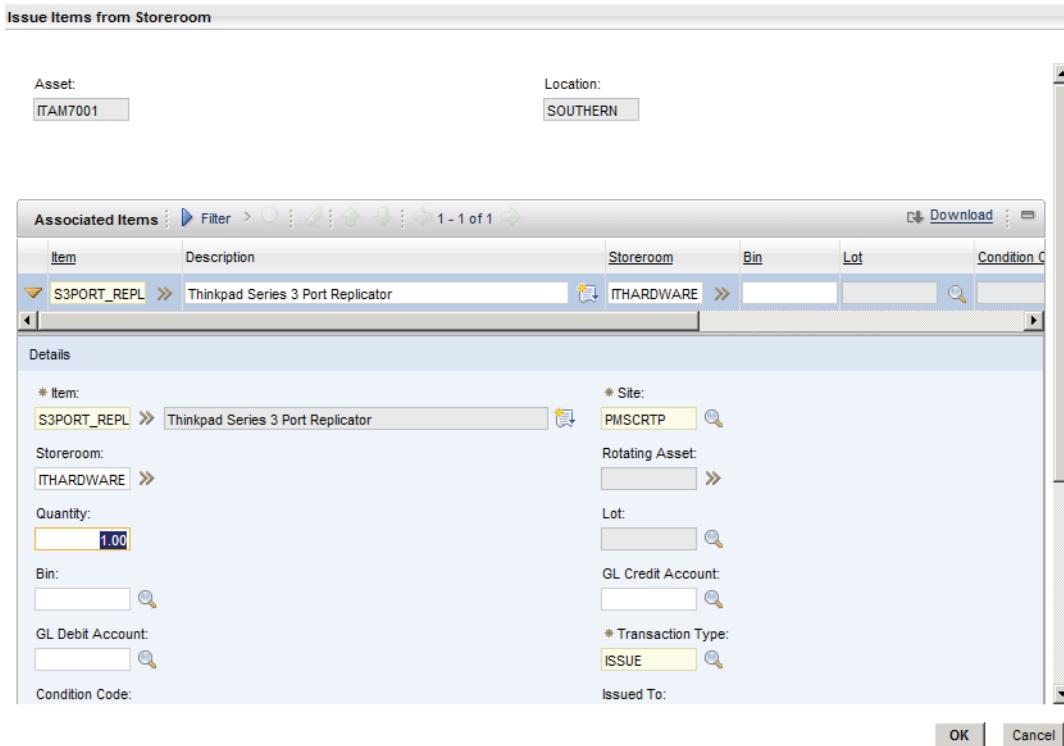
- ___ 7. Click the **Specifications** tab. Notice that the Specifications tab shows the attributes for this notebook. These specifications were copied from the rotating item record.
- ___ 8. Click **Apply Item Assembly Structure** under More Actions in the navigation bar.
- ___ 9. Click **Autonumber All** to assign each rotating asset in the item assembly structure an asset number and click **OK**.



- ___ 10. Click the **Spare Parts** tab.
- ___ 11. Review the information from the Item Assembly Structure that you applied. The monitor is a subassembly because it is a rotating item. The port replicator is a spare part because it is a nonrotating item. Also, notice that the port replicator is not issued.

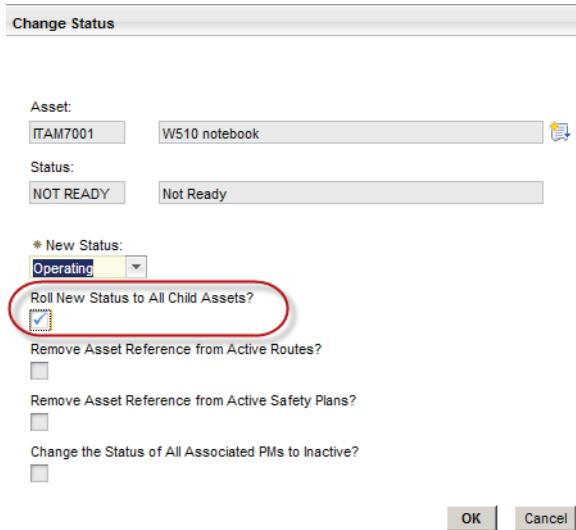


- ___ 12. Click **Issue Items from Storerooms** under More Actions in the navigation bar.
- ___ 13. Click **New Row**.
- ___ 14. Enter **S3PORT_REPLICATOR** for the item and **ITHARDWARE** for the storeroom.



- ___ 15. Click **OK** to issue the port replicator to the ITAM7001 asset.
- ___ 16. Click the **Change Status** icon and set the status to **Operating**.

- ___ 17. Select the **Roll Asset Status to All Child Assets** option and click **OK**. The Roll Asset Status to All Child Assets updates the status for all rotating assets that are part of the Item Assembly Structure.



- ___ 18. Notice that the port replicator indicates an issue quantity of **1**.
- ___ 19. Click **Go To Applications > Inventory > Inventory** in the navigation bar.
- ___ 20. Press Enter to view a list of all items in inventory.
- ___ 21. Notice that the Current Balance for the **S3Port_Replicator** item is now **9**.
- ___ 22. Open the **S3Port_Replicator** item.
- ___ 23. Click the **Where Used** tab.
- ___ 24. Verify that the **ITAM7001** asset is in the Used On list.
- ___ 25. Sign out of the console.

Importing a list of assets in the Quick Configuration tool



Note: The SEQQIN cron task instance must be active for the data loaded using the Quick Configuration tool data to be processed. The first few steps in this exercise demonstrate how to verify that the task is running.

- ___ 26. Log in to the console as **maxadmin** with the password **object00**.

- ___ 27. Click **System Configuration > Platform Configuration > Cron Task Setup** in the navigation bar.
- ___ 28. Find and open the **JMSQSEQCONSUMER** cron task.
- ___ 29. Verify that the **SEQQIN** is **Active**.

| Cron Task Instances | | | | | |
|-------------------------|-------------|-------------|-------------------------------------|-------------------------------------|--------------|
| Cron Task Instance Name | Schedule | Run as User | Active? | Keep History? | More Actions |
| SEQQIN | 30s,*,*,*,* | MAXADMIN | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| SEQQOUT | 30s,*,*,*,* | MAXADMIN | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

- ___ 30. If the SEQQIN instance is not active, select the **Active** option and click **Reload Request** under More Actions in the navigation bar. If it is active, continue to the next step.
- ___ 31. Minimize Internet Explorer.
- ___ 32. Open Windows Explorer and change to the **E:\LabFiles\ITAsset** directory.
- ___ 33. Double-click the **Leased_Assets_Import.ods** file to open it with Lotus Symphony.
- ___ 34. Review the contents of the spreadsheet.

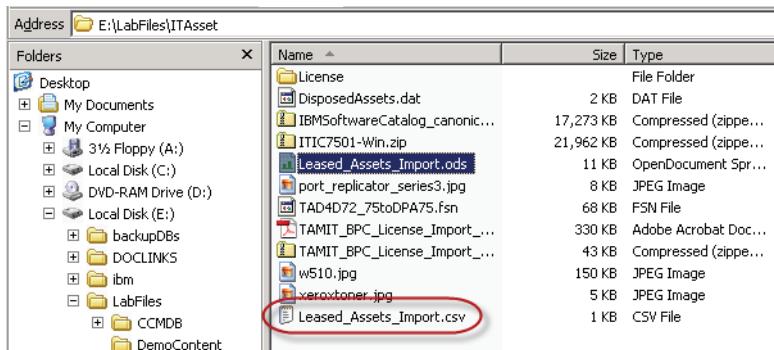


Note: This spreadsheet provides a simple example of how to format an asset import. The file must be saved to a comma-separated values (CSV) file. It only contains a subset of attributes that you can define for the imported assets. For a more comprehensive example, download the example import CSV files from this website:

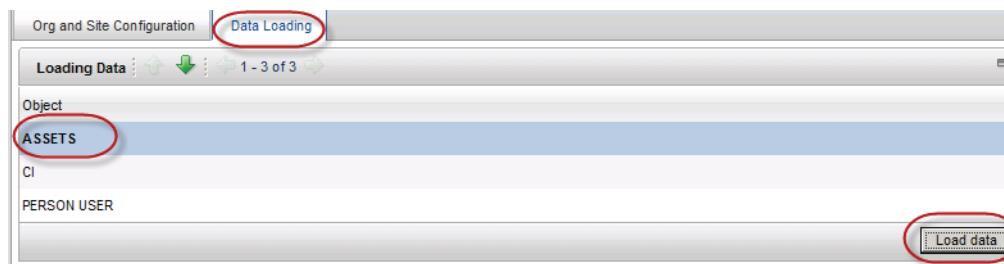
http://publib.boulder.ibm.com/infocenter/tivihelp/v51r1/topic/com.ibm.tusc.doc/import/r_sample_csv_files.html

- ___ 35. Click **File > Save As**.
- ___ 36. Change the Save as type to **Text CSV(*.csv)** and click **Save**.
- ___ 37. Click **OK** to dismiss the compatibility message.
- ___ 38. Close **Lotus Symphony**.

- _____ 39. Verify that the **Leased_Assets_Import.csv** file was created in the **E:\LabFiles\ITAsset** directory. Optionally, open the .csv file in a text editor and review it. Close the file if you open it.

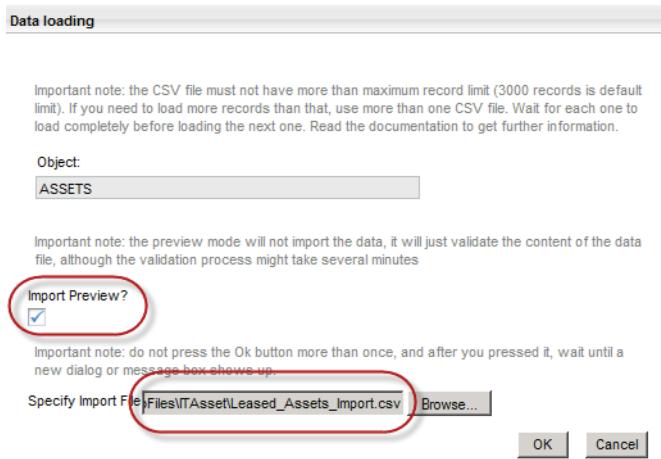


- _____ 40. Maximize Internet Explorer.
_____ 41. Click **Go To Applications > System Configuration > Platform Configuration > Quick Configuration** in the navigation bar.
_____ 42. Click the **Data Loading** tab.
_____ 43. Select **ASSET** to select it for the Object and click **Load data**.



- _____ 44. Click **Browse** and change to the **E:\LabFiles\ITAsset** directory.
_____ 45. Select the **Leased_Assets_Import.csv** file and click **Open**.

- ___ 46. Verify that the **Import Preview** option is selected and click **OK**.



- ___ 47. Review the **Preview Results**. There are 9 records processed and no errors.

- ___ 48. Click **OK** to dismiss the preview results.

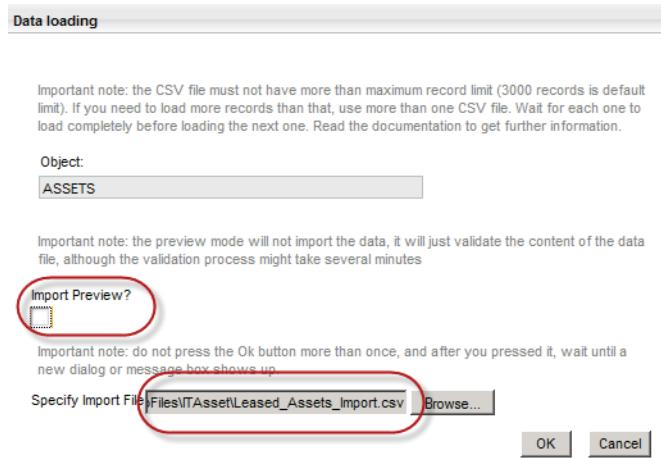


Note: You must ensure that there are no errors before performing the actual import.

- ___ 49. Click **Load data**.

- ___ 50. **Browse** and select the **Leased_Assets_Import.csv** file.

- ___ 51. Clear the **Import Preview** option and click **OK** to import the data.



- ___ 52. Click **OK** to dismiss the Inbound transaction has been processed message.

- ___ 53. Verify that there are **9** records pending in the queue.

- ___ 54. Click **Refresh** until the Total pending records is **0**.



- ___ 55. Click **Assets > Assets** in the navigation bar.

- ___ 56. Type **ITAM7** in the **Asset** filter field and press Enter to search for assets that begin with **ITAM7**.

- ___ 57. Verify that **ITAM7002 - ITAM7010** are in the list. These assets were in the **Leased_Assets_Import.csv** file. You associate these assets with a lease contract in Exercise 2-16, "Adding assets to a contract" on page 2-37.

A screenshot of the 'Assets' list view. At the top, it says 'Assets' and shows 'Filter >'. Below that is a toolbar with icons for search, filter, and refresh. The status bar at the bottom left says '1 - 10 of 10'. The table has columns: Asset, Description, Location, Parent, Primary Customer, and Rotating Item. A red box highlights the 'Asset' column header. The first row shows 'ITAM7' in the Asset column. The following ten rows show assets from ITAM7001 to ITAM7010, all categorized as 'W510 notebook' under 'Description' and 'SOUTHERN' under 'Location'. The 'Primary Customer' column shows 'W510' for all entries. The 'Rotating Item' column is empty.

| Asset | Description | Location | Parent | Primary Customer | Rotating Item |
|----------|---------------|----------|--------|------------------|---------------|
| ITAM7 | | | | | |
| ITAM7001 | W510 notebook | SOUTHERN | | W510 | |
| ITAM7002 | W510 notebook | SOUTHERN | | W510 | |
| ITAM7003 | W510 notebook | SOUTHERN | | W510 | |
| ITAM7004 | W510 notebook | SOUTHERN | | W510 | |
| ITAM7005 | W510 notebook | SOUTHERN | | W510 | |
| ITAM7006 | W510 notebook | SOUTHERN | | W510 | |
| ITAM7007 | W510 notebook | SOUTHERN | | W510 | |
| ITAM7008 | W510 notebook | SOUTHERN | | W510 | |
| ITAM7009 | W510 notebook | SOUTHERN | | W510 | |
| ITAM7010 | W510 notebook | SOUTHERN | | W510 | |

Exercise 2-14: Associating users with an asset

This exercise shows you how to create associations between people and assets.

- ___ 1. Verify that you are in the Asset application. If not, click **Assets > Assets** in the navigation bar.
- ___ 2. Find and open the **ITAM7001** asset record.
- ___ 3. Click **Associate Users and Custodians** under Common Actions in the navigation bar.

- ___ 4. Click **New Row** in the Associate Users and Custodians section.
- ___ 5. Enter **Steve** in the person field.
- ___ 6. Select **Primary** and **Custodian** for the association types.

Associate Users and Custodians

| Person | Name | Primary? | Custodian? | User? |
|--------|-----------------|-------------------------------------|-------------------------------------|--------------------------|
| STEVE | Steve Requester | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Details

* Person:
STEVE > Steve Requester

Primary?

Custodian?

User?

Planned Modifications

Will be Primary?

Will be Custodian?

Will be User?

Modify?

Add?

Remove?

Class:



Note: The first association must always be Primary. The Primary option is selected by default.

- ___ 7. Click **OK** to complete the association.

The Associate Users and Custodians window closes and the association between Steve and the asset is registered.

If you want to associate a user to many assets, you can use the **Move/Modify Assets** action.

- ___ 8. Click **View Record List** to return to the list of assets.
- ___ 9. Enter **ITAM7** in the Asset filter field and press Enter.
- ___ 10. Click the **Select Records** option at the bottom of the list.

- ___ 11. Select all of the records except **ITAM7001**. You do not need to select the **ITAM7001** record because you already associated it with a user.

| | Asset | Description | Location | Parent | Primary Customer | Rotating Item | |
|-------------------------------------|----------------|---------------|----------|--------|------------------|---------------|---|
| <input type="checkbox"/> | ITAM7001 | W510 notebook | SOUTHERN | | | W510 | F |
| <input checked="" type="checkbox"/> | ITAM7002 | W510 notebook | SOUTHERN | | | W510 | F |
| <input checked="" type="checkbox"/> | ITAM7003 | W510 notebook | SOUTHERN | | | W510 | F |
| <input checked="" type="checkbox"/> | ITAM7004 | W510 notebook | SOUTHERN | | | W510 | F |
| <input checked="" type="checkbox"/> | ITAM7005 | W510 notebook | SOUTHERN | | | W510 | F |
| <input checked="" type="checkbox"/> | ITAM7006 | W510 notebook | SOUTHERN | | | W510 | F |
| <input checked="" type="checkbox"/> | ITAM7007 | W510 notebook | SOUTHERN | | | W510 | F |
| <input checked="" type="checkbox"/> | ITAM7008 | W510 notebook | SOUTHERN | | | W510 | F |
| <input checked="" type="checkbox"/> | ITAM7009 | W510 notebook | SOUTHERN | | | W510 | F |
| <input checked="" type="checkbox"/> | ITAM7010 | W510 notebook | SOUTHERN | | | W510 | F |
| <input checked="" type="checkbox"/> | Select Records | | | | | | |

- ___ 12. Click **Move/Modify Assets** under the Common Actions in the navigation bar.
 ___ 13. Click the **Users and Custodians** tab.
 ___ 14. Click the **Modify All** subtab.
 ___ 15. Enter **Steve** in the Person field.
 ___ 16. Select **Primary** and **Custodian** and click **Apply**.

| Asset | Description | Condition Code | Location | Bin | Parent | Priority |
|----------|---------------|----------------|----------|-----|--------|----------|
| ITAM7001 | W510 notebook | | SOUTHERN | | | |
| ITAM7002 | W510 notebook | | SOUTHERN | | | |
| ITAM7003 | W510 notebook | | SOUTHERN | | | |
| ITAM7004 | W510 notebook | | SOUTHERN | | | |
| ITAM7005 | W510 notebook | | SOUTHERN | | | |
| ITAM7006 | W510 notebook | | SOUTHERN | | | |
| ITAM7007 | W510 notebook | | SOUTHERN | | | |
| ITAM7008 | W510 notebook | | SOUTHERN | | | |
| ITAM7009 | W510 notebook | | SOUTHERN | | | |
| ITAM7010 | W510 notebook | | SOUTHERN | | | |

Modify Selected Modify All

| Person | Name | Custodian? | User? | Primary? | Delete? |
|--------|-----------------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|
| STEVE | Steve Requester | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Apply New Row

- ___ 17. Click **OK** to submit the Move/Modify Assets action.

- ___ 18. Click **Close** to close the system message indicating that the move was successful.

Exercise 2-15: Searching for assets based on associations

Because you created associations between a person and an asset, you can use the Advanced Search to find assets that are associated with a person. Users can also see a list of assets on which they are listed as a user or custodian. This exercise demonstrates how to search for assets in the Assets application and how to view assets in the self service center.

- ___ 1. Clear any filters in the filter fields.



Note: This step is not required, but many people find that clearing the filter fields is a good practice to follow when performing searches. If you do not clear the filter fields, they are copied to the Advanced Search and your result might be different.

- ___ 2. Click the **Advanced Search** link.

The More Search Fields window opens.

- ___ 3. Enter **Steve** in the Custodian field.

- ___ 4. Click **Find**.

- ___ 5. Review the list of assets for which **Steve** is the assigned user. Verify that **ITAM7001 - ITAM7010** are in the list. If they are not, repeat Exercise 2-14, “Associating users with an asset” on page 2-33.

| Assets | | | | | | |
|----------|---------------------|----------|--------|------------------|---------------|--|
| Asset | Description | Location | Parent | Primary Customer | Rotating Iter | |
| ITAM7001 | W510 notebook | SOUTHERN | | | W510 | |
| ITAM7002 | W510 notebook | SOUTHERN | | | W510 | |
| ITAM7003 | W510 notebook | SOUTHERN | | | W510 | |
| ITAM7004 | W510 notebook | SOUTHERN | | | W510 | |
| ITAM7005 | W510 notebook | SOUTHERN | | | W510 | |
| ITAM7006 | W510 notebook | SOUTHERN | | | W510 | |
| ITAM7007 | W510 notebook | SOUTHERN | | | W510 | |
| ITAM7008 | W510 notebook | SOUTHERN | | | W510 | |
| ITAM7009 | W510 notebook | SOUTHERN | | | W510 | |
| ITAM7010 | W510 notebook | SOUTHERN | | | W510 | |
| TUSC1057 | Lenovo G550 Desktop | SOUTHERN | | | | |

- ___ 6. Sign out of the console.

- ___ 7. Log in to the console as **bob** with the password **object00**. Bob is a self service center user.
- ___ 8. Click **Show All My Assets** in the My Assets pod.



- ___ 9. Review the list of assets that are assigned to Bob.

| Asset Number | Serial Number | Description | Status | Location | Refresh Date | Planned Refresh | Primary User | Custodian |
|--------------|---------------|---|------------|----------|-------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| TUSC2000 | | Lenovo ThinkCentre M78 Tower Desktop PC | NOT READY | | 12/22/2015 12:01/6/2012 12:00 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| TUSC1056 | 9366 | Lenovo ThinkCentre M78 Tower Desktop PC | OPERATING | NEWYORK | 12/21/2015 12:01 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| ITAM1061 | 59320TYR13428 | Lenovo 3000 Desktop | LIMITEDUSE | WESTERN | 5/15/2012 12:00 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| ITAM1032 | | Lenovo X61 Thinkpad Tablet | NOT READY | NEWYORK | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| ITAM1031 | | Lenovo X61 Thinkpad Tablet | NOT READY | WESTERN | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| ITAM1030 | | Lenovo X61 Thinkpad Tablet | NOT READY | SOUTHERN | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| ITAM1004 | | Lenovo Thinkpad T61 | NOT READY | NEWYORK | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| ITAM1001 | L3EZT83 | Lenovo Thinkpad T61 | OPERATING | NORTHERN | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

- ___ 10. Close the **My Assets** window and sign out of the console.

Exercise 2-16: Adding assets to a contract

This exercise demonstrates how to associate assets to a contract.

- ___ 1. Log in as **jake** with the password **object00**.
- ___ 2. Click **Contracts > Lease/Rental Contracts** in the navigation bar.
- ___ 3. Find and open the lease contract from Exercise 2-11, “Creating a lease contract” on page 2-20.
- ___ 4. Click the **Associated Assets** tab.
- ___ 5. Click **Select More Assets**.

___ 6. Enter **W510** in the Rotating Asset filter field and press Enter.

___ 7. Select the **ITAM7001 - ITAM7010** assets and click **OK**.

| Asset | Description | Location | Site | Rotating Item | Type | Reconciliation Failures? |
|--|---------------|----------|---------|---------------|------|--------------------------|
| | | | | W510 | | |
| <input checked="" type="checkbox"/> ITAM7001 | W510 notebook | SOUTHERN | PMSCRTP | W510 | IT | |
| <input checked="" type="checkbox"/> ITAM7009 | W510 notebook | SOUTHERN | PMSCRTP | W510 | IT | |
| <input checked="" type="checkbox"/> ITAM7002 | W510 notebook | SOUTHERN | PMSCRTP | W510 | IT | |
| <input checked="" type="checkbox"/> ITAM7003 | W510 notebook | SOUTHERN | PMSCRTP | W510 | IT | |
| <input checked="" type="checkbox"/> ITAM7004 | W510 notebook | SOUTHERN | PMSCRTP | W510 | IT | |
| <input checked="" type="checkbox"/> ITAM7005 | W510 notebook | SOUTHERN | PMSCRTP | W510 | IT | |
| <input checked="" type="checkbox"/> ITAM7006 | W510 notebook | SOUTHERN | PMSCRTP | W510 | IT | |
| <input checked="" type="checkbox"/> ITAM7007 | W510 notebook | SOUTHERN | PMSCRTP | W510 | IT | |
| <input checked="" type="checkbox"/> ITAM7008 | W510 notebook | SOUTHERN | PMSCRTP | W510 | IT | |
| <input checked="" type="checkbox"/> ITAM7010 | W510 notebook | SOUTHERN | PMSCRTP | W510 | IT | |

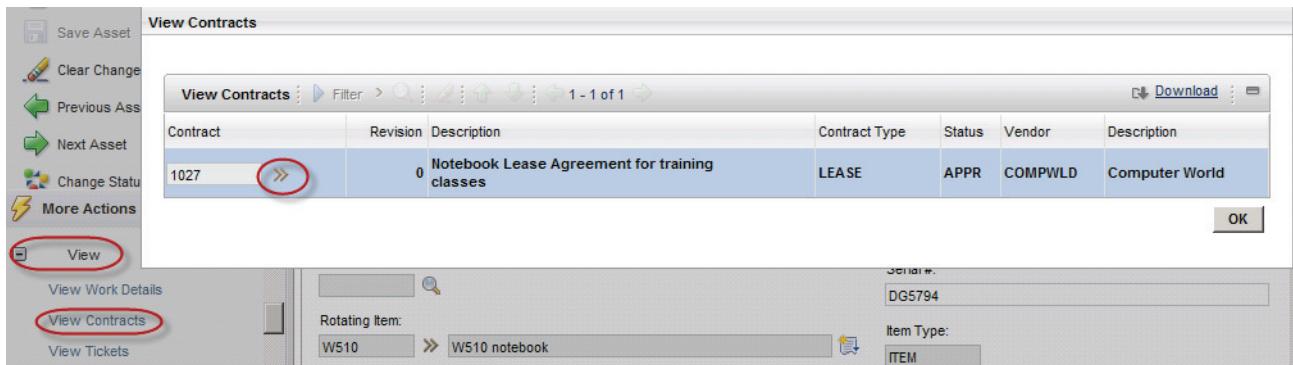
___ 8. Save the contract.

Exercise 2-17: Viewing contract details for an asset

When working with an asset, it is useful to view any contract information that is linked to the asset. For example, before you move an asset, it is useful to know whether the lease is almost over. This exercise demonstrates how to view contract information for an asset.

- ___ 1. Click **Go To Applications > Assets > Assets** in the navigation bar.
- ___ 2. Find and open the **ITAM7001** asset.
- ___ 3. Click **View > View Contracts** under More Actions in the navigation bar.

- _____ 4. Verify that the **Notebook Lease Agreement** is listed. You can optionally click the **Detail Menu** for the contract to view the details. If you view the contract details, click **Return**.



- _____ 5. Click **OK** to close the View Contracts window.
_____ 6. Sign out of the console.
_____ 7. Tell your instructor that you are finished with the unit exercises.

Student exercises for Unit 3

In Unit 2, you created several different items, assets, and contracts. In the exercises in this unit, you continue working with several of the constructs that you created in Unit 2. The following sections provide an overview of how you can use these constructs in the purchasing process:

- Purchase and receive the toner cartridges

You start this process by using the inventory reorder feature. When you initiate the reorder, a purchase requisition for the toner is created based on the **XeroxHCToner** item that you created in the previous unit. Then, a purchase order is created from the purchase requisition. The toner cartridges are received into the ITHARDWARE storeroom. They are not serialized because they are not rotating items. Finally, an invoice is received and marked as *paid* for the toner.

- Purchase and receive a notebook

You start this process by creating an asset request in the self service center. A workflow is used to obtain the proper approval and move the request through the process. You want to ensure that you are paying the best price for the notebook. Therefore, you enter a request for quotation (RFQ). After selecting a vendor, the notebook is purchased. The notebook is then received into the ITHARDWARE storeroom and assigned asset numbers. Finally, an invoice is received and marked as *paid* for the notebook system.

Exercise 3-1: Creating and approving a purchase requisition

This exercise demonstrates various ways to create purchase requisitions. The first example uses the reorder feature in the Inventory application. The second example shows how to initiate the request in the self service center. This integration between service request management and IT asset management is a key advantage of IBM SmartCloud Control Desk. The third example shows how to create the purchase requisition in the Purchase Requisition application.

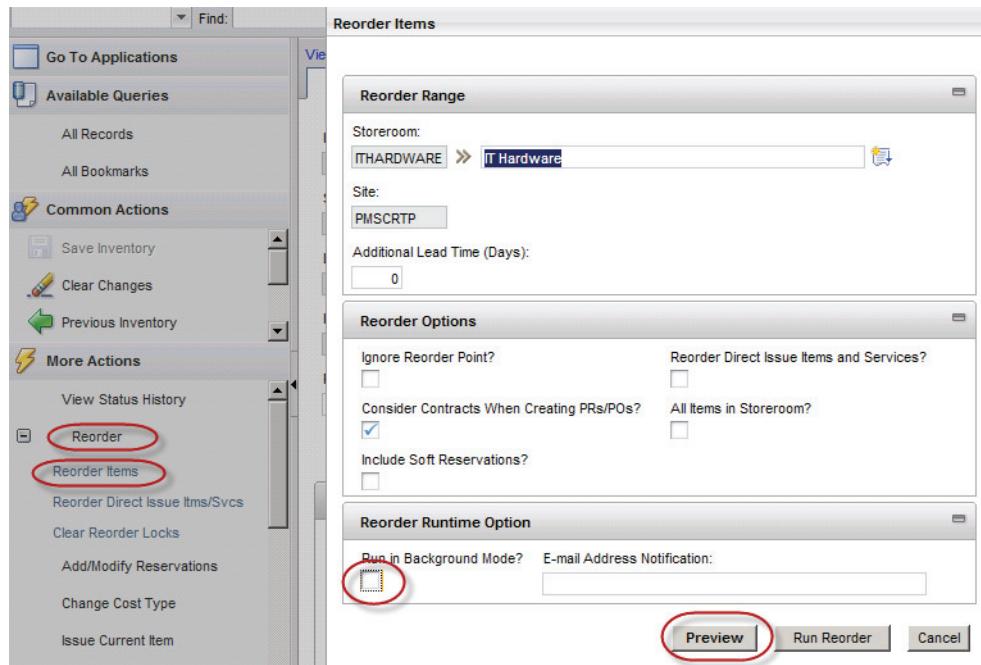
Creating a purchase requisition by using inventory reorder

- ____ 1. Log in to the console as **elmo** with the password **object00**. Remember that Elmo is an inventory administrator. He noticed the toner inventory was low and decided to replenish the inventory by using the reorder feature.
- ____ 2. Click the **Inventory Administrator** Start Center tab.

- ___ 3. Click **Inventory** in the Favorite Applications portlet.



- ___ 4. Find and open the **XEROXHCTONER** item.
___ 5. Click **Reorder > Reorder Items** under More Actions in the navigation bar.
___ 6. Clear the **Run in Background Mode** option and click **Preview**.



- ___ 7. Review the reorder details. Verify that the reorder quantity is **10**. You configured this quantity in the previous unit. You can also set the price. However, in this example, the price is set in the purchase order approval process in Exercise 3-4, “Approving a purchase order” on page 3-22.

- _____ 8. Click **Run Reorder**.

The screenshot shows a table titled "Reorder Items Detail" with columns: Item, Description, Condition Code, Current Balance, Order Unit, Reorder Quantity, and Unit Cost. A row is selected for "XEROXHCTON" which is described as "Xerox High-Capacity Toner cartridge 4100 pages". The "Reorder Quantity" field contains "10.00" which is circled in red. At the bottom of the screen, there are buttons for "Run Reorder" (which is highlighted with a red oval), "Reorder Report", and "Cancel".

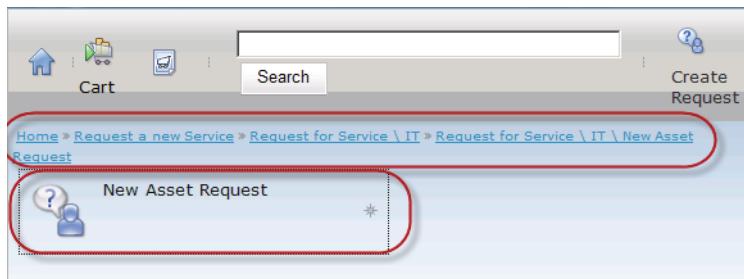
- _____ 9. Write down the number for the PR _____.
- _____ 10. Click **OK** to dismiss the Reorder Results window.
- _____ 11. Click the **Start Center** icon to return to the Inventory Administrator Start Center.
- _____ 12. Click **Purchase Requisitions** in the Favorite Application porlet.
- _____ 13. Find and open the PR that you created in the previous steps.

The screenshot shows the "View Record List > 1016" screen. It has tabs for PR, PR Lines, Ship To / Bill To, Terms and Conditions, and Specifications. The PR tab is selected. The PR number is 1016. The status is WAPPR. The site is PMSCRTP. The "Generated by reorder 8/31/12 17:21:25" timestamp is highlighted with a yellow box. The screen is divided into three main sections: Details, Dates, and Costs. The Details section includes fields for Priority (0), Requested By (ELMO), Supervisor, Contract Reference, Contract Type, and Contract Revision. The Dates section includes Status Date (8/31/12 17:21:25), Requested Date (8/31/12 17:21:24), and Required Date. The Costs section includes Prefax Total (0.00), Total Tax (0.00), Total Cost (0.00), Currency (USD), and Total Base Cost (0.00). A Vendor section is also visible at the bottom.

- _____ 14. Click the **Approve Purchase Requisition** icon and set the status to **Approved**.
- _____ 15. Sign out of the console.

Requesting an asset in the Self Service Center and creating a purchase requisition

- ___ 16. Log in to the console as **bob** with the password **object00**.
- ___ 17. Click **Request a new Service > Request for Service \ IT > Request for Service \ IT \ New Asset Request** to navigate to the New Asset Request offering.
- ___ 18. Click the **New Asset Request** offering to enter the request details.



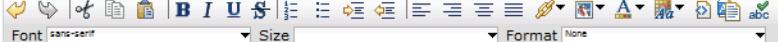
Note: This offering is part of the demonstration data. It shows how you can create service catalog offerings for your most common IT service request. Automation is built into the offering to ensure that the correct procedures are followed.

- ___ 19. Enter **Starting a new role and I need a more powerful notebook to perform my job tasks. This notebook will be my primary workstation** for the Details.
- ___ 20. Set the priority to **1**.
- ___ 21. Enter the following information for the attributes.

| Field | Value |
|--------------------------|-------------------------|
| Type | W510 |
| Any special instructions | Need 8 GB of RAM |

Report an Issue

* Summary:
New Asset Request

Details:

Font: sans-serif | Size: 10 | Format: None
Starting a new role and I need a more powerful laptop to perform my job tasks. This laptop will be my primary workstation

Reported For: BOB Priority: 1

Class Description: Request for Service \ IT \ New Asset Request >

Phone: 713-297-7900

E-mail: bob@tivoli.edu

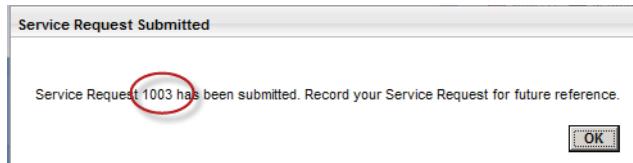
Attributes Filter 1 - 5 of 5 Download

| Description | Value |
|--------------------------|------------------------|
| Type | W510 |
| Any special instructions | Need 8GB of RAM |

Add to Favorites Submit Now Cancel

- ___ 22. Click **Submit Now**.

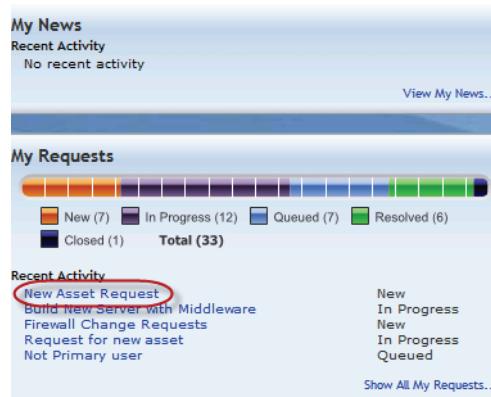
- ___ 23. Write down the service request number. _____



Note: The service request number is automatically generated. Your service request number might not match the screen capture. Write down the number that is generated for you.

- ___ 24. Click **OK** to dismiss the message.

- ___ 25. Click the most recent **New Asset Request** service request in the My Requests pod.



- ___ 26. Review the request.

- ___ 27. Click **OK** to close the view.

- ___ 28. Sign out of the console.

Approving the request

A workflow has been associated with the New Asset Request offering. The request must be approved by the manager of the user to continue to the next step in the workflow.

- ___ 29. Log in to the console as **fred** with the password **object00**.

- ___ 30. Find the **Manager Approval for New Asset Request** with *today's date* in the Inbox/Assignments portlet.
- ___ 31. Click the **Route** icon.

| Inbox / Assignments | | | |
|--|---------------------|-------|--|
| Next Assignment Due: 8/31/12 17:27:02 Refresh | | | |
| Description | DUEDATE | Route | |
| Manager Approval from BOB for 'Firewall Change Requests' | 2/19/12 12:52:43 | | |
| Manager Approval from BOB for 'Request PC' | 8/10/11 13:31:41 | | |
| Manager Approval for New Asset Request | 5/11/12 20:28:32 | | |
| Manager Approval for New Asset Request | 8/31/12 17:27:02 | | |

- ___ 32. Select **Approve** and click **OK**.
- ___ 33. Sign out of the console.

Checking inventory

After the request is approved, the associated workflow sends an assignment to the inventory administrator to check the inventory. The inventory administrator checks the inventory and indicates whether the request can be fulfilled from inventory or if a purchase requisition is required.

- ___ 34. Log in to the console as **elmo** with the password **object00**.
- ___ 35. Click the **Inventory Administrator** Start Center tab.
- ___ 36. Find and open the **Inventory Available to Fulfill Request** assignment with *today's date* in the Inbox/Assignments portlet.

| Inbox / Assignments | | | | |
|---|------------------|----------|------------------|-------|
| Next Assignment Due: 8/31/12 17:32:27 Refresh | | | | |
| Description | Due Date | Priority | Start Date | Route |
| Inventory Available to Fulfill Request? | 6/2/11 16:53:33 | | 6/2/11 16:53:33 | |
| Inventory Available to Fulfill Request? | 8/31/12 17:32:27 | | 8/31/12 17:32:27 | |

- ___ 37. Click **OK** to dismiss the workflow help.
- ___ 38. Review the service request. Read the details and the specifications. The specifications list includes the type of notebook that the user is requesting.
- ___ 39. Click the **Start Center** icon to return to the Inventory Administrator Start Center.
- ___ 40. Click **Inventory** in the Favorite Applications portlet.

- ___ 41. Press Enter to view all items in inventory. Notice that there are no W510 notebooks in inventory.

| Item | Description | Storeroom | Current Balance | Commodity Group | Rotating? |
|-------------------|--|-------------|-----------------|-----------------|-------------------------------------|
| ITAMT61 | Lenovo Thinkpad T61 | IT HARDWARE | 7.00 | 43211500 | <input checked="" type="checkbox"/> |
| ITAMM57P | Lenovo ThinkCentre M57p Desktop | IT HARDWARE | 7.00 | 43211500 | <input checked="" type="checkbox"/> |
| ITAMX61T | Lenovo X61 Thinkpad Tablet | IT HARDWARE | 10.00 | | <input checked="" type="checkbox"/> |
| ITAMCISCO PHONE | | IT HARDWARE | 0.00 | 43211800 | <input checked="" type="checkbox"/> |
| ITAMMONITOR | computer display | IT HARDWARE | 0.00 | | <input checked="" type="checkbox"/> |
| ITAMT40P | Lenovo Thinkpad T40P | IT HARDWARE | 2.00 | 43211500 | <input checked="" type="checkbox"/> |
| ITAMT60 | Lenovo Thinkpad T60 | IT HARDWARE | 0.00 | | <input checked="" type="checkbox"/> |
| XEROXHTONER | Xerox High-Capacity Toner cartridge 4100 pages | IT HARDWARE | 5.00 | | <input type="checkbox"/> |
| W510 | W510 notebook | IT HARDWARE | 0.00 | | <input checked="" type="checkbox"/> |
| S3PORT_REPLICATOR | Thinkpad Series 3 Port Replicator | IT HARDWARE | 9.00 | | <input type="checkbox"/> |

- ___ 42. Click the **Start Center** icon to return to the Inventory Administrator Start Center.
- ___ 43. Click the **Route** icon for the **Inventory Available to Fulfill Request** assignment with *today's date* in the Inbox/Assignments portlet.

| Inbox / Assignments | | | | |
|---|------------------|----------|------------------|-------|
| Description | Due Date | Priority | Start Date | Route |
| Inventory Available to Fulfill Request? | 6/2/11 16:53:33 | | 6/2/11 16:53:33 | |
| Inventory Available to Fulfill Request? | 8/31/12 17:32:27 | | 8/31/12 17:32:27 | |

- ___ 44. Select **Fulfill via PR for New Assets** and click **OK**.

Complete Workflow Assignment

Task:
Inventory Available to Fulfill Request?

Action:

Fulfill from Inventory
 Fulfill via PR for New Assets

Memo:

Earlier Memos | Filter > ... 0 - 0 of 0 Download ...

Memo Person Transaction Date ...No rows to display...

OK Reassign Cancel

Initiating the work order

The associated workflow creates a work order with a job plan for fulfilling the request by using a purchase request. The inventory administrator uses the Work Order Tracking application to start the work. This exercise briefly covers work orders. Work orders are covered in more depth in the next unit.

___ 45. Write down the work order number _____.

View Record List > 1156

Work Order Plans Assignments Related Records Actuals Safety Plan

Work Order:
1156 New Asset Request

Location:

Asset:



Note: The work order number is automatically generated. Your work order number might not match the screen capture. Write down the number that is generated for you.

___ 46. Click the **Initiate Work Order** icon and set the status to **In Progress**.

___ 47. Click the **Plans** tab.

___ 48. Notice that the first task in the plan, **Create Purchase Request for New Asset**, has a status of INPROG (In Progress). This task is assigned to the Inventory Administrators group (ITAMINVN). Elmo is a member of this group.

| Tasks for Work Order 1156 | | | | | | |
|---------------------------|----------|------|--|--------------------|--------|--------------|
| | Sequence | Task | Summary | Estimated Duration | Status | Owner |
| ▶ | 20 | 20 | Create Purchase Request for New Asset | 1:00 | INPROG | » ITAMINVN » |
| ▶ | 25 | 25 | Issue Asset from Inventory to Work Order | 1:00 | WAPPR | » ITAMINVN » |
| ▶ | 30 | 30 | Build, Image and Deliver New Asset | 1:00 | WAPPR | » ITAMHAN » |

Creating the purchase request

The first step in the work order plan is to create a purchase request. A purchase request is created in the Purchase Requisition application. The inventory administrator decides to order a few more notebooks to replenish the inventory.

___ 49. Click the **Start Center** icon to return to the Inventory Administrator Start Center.

- ___ 50. Notice that there is a new task, **Create Purchase Request for New Asset**, in the Open Tasks for Inventory Admin portlet.

| Activity | Summary | Status | Reported Date |
|----------|--|--------|-------------------|
| W01370 | Issue Std Desktop from Inventory to Work Order | INPRG | 7/19/11 10:34:39 |
| WO1373 | Issue Std Laptop from Inventory to Work Order | INPRG | 7/19/11 10:46:12 |
| WO1427 | Issue Cisco 6500 from Inventory to Work Order | INPRG | 8/10/11 13:57:05 |
| TUSC1195 | Issue Asset from Inventory to Work Order | APPR | 12/23/11 14:41:40 |
| 1157 | Create Purchase Request for New Asset | INPRG | 8/31/12 17:37:28 |

- ___ 51. Click **New Purchase Requisition** in the Quick Insert portlet.
- ___ 52. Enter **Purchase request for W510 Notebooks for WO XXXX and inventory replenishment** for the description where **XXXX** is the number of the work order initiated in the previous steps. You wrote down this number in the previous section.
- ___ 53. Enter **1** for the **Priority**.
- ___ 54. Enter **2 weeks** from today for the **Required Date**.

View Record List > 1017

| PR | PR Lines | Ship To / Bill To | Terms and Conditions | Specifications | | | | | | | | | | | | | | | | | | | | | |
|--|--|--------------------------|----------------------|----------------|----------------|--------------|--------------|------------------|----------------------------------|-----------------------|-----------------------|-------------------------------------|--------------------|-------------|------------------------------------|---------------------|---------------------|--|--------------------|----------------|--|--------------------------|--------------------|--|--|
| * PR: 1017 | Purchase request for W510 Notebooks for WO 1156 and inve | | Site: PMSCRTP | Status: WAPPR | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <tr> <td>Details</td> <td>Dates</td> <td>Costs</td> </tr> <tr> <td>* Priority: 1</td> <td>Status Date: 8/31/12 17:45:55</td> <td>Pretax Total: 0.00</td> </tr> <tr> <td>Requested By: ELMO</td> <td>Requested Date: 8/31/12 17:45:55</td> <td>Total Tax: 0.00</td> </tr> <tr> <td>Supervisor:</td> <td>Required Date: 9/14/12 17:45:55</td> <td>Total Cost: 0.00</td> </tr> <tr> <td>Contract Reference:</td> <td></td> <td>* Currency: USD</td> </tr> <tr> <td>Contract Type:</td> <td></td> <td>Total Base Cost: 0.00</td> </tr> <tr> <td>Contract Revision:</td> <td></td> <td></td> </tr> </table> | | | | | Details | Dates | Costs | * Priority: 1 | Status Date: 8/31/12 17:45:55 | Pretax Total: 0.00 | Requested By: ELMO | Requested Date: 8/31/12 17:45:55 | Total Tax: 0.00 | Supervisor: | Required Date: 9/14/12 17:45:55 | Total Cost: 0.00 | Contract Reference: | | * Currency: USD | Contract Type: | | Total Base Cost: 0.00 | Contract Revision: | | |
| Details | Dates | Costs | | | | | | | | | | | | | | | | | | | | | | | |
| * Priority: 1 | Status Date: 8/31/12 17:45:55 | Pretax Total: 0.00 | | | | | | | | | | | | | | | | | | | | | | | |
| Requested By: ELMO | Requested Date: 8/31/12 17:45:55 | Total Tax: 0.00 | | | | | | | | | | | | | | | | | | | | | | | |
| Supervisor: | Required Date: 9/14/12 17:45:55 | Total Cost: 0.00 | | | | | | | | | | | | | | | | | | | | | | | |
| Contract Reference: | | * Currency: USD | | | | | | | | | | | | | | | | | | | | | | | |
| Contract Type: | | Total Base Cost: 0.00 | | | | | | | | | | | | | | | | | | | | | | | |
| Contract Revision: | | | | | | | | | | | | | | | | | | | | | | | | | |
| Vendor | | | | | | | | | | | | | | | | | | | | | | | | | |

- ___ 55. Click the **PR Lines** tab.
- ___ 56. Click **New Row**.

57. Enter the following information for the PR Line.

| Field | Value |
|-----------------------|-------------------|
| Item | W510 |
| Quantity | 6 |
| Conversion Factor | 1 |
| Storeroom (Charge To) | ITHARDWARE |

The screenshot shows the Purchase Requisition Lines screen. At the top, there are tabs for PR, PR Lines, Ship To / Bill To, Terms and Conditions, and Specifications. The PR Lines tab is selected. Below the tabs, there are fields for PR Number (1017), Site (PMSCRTP), and Status (WAPPR). The main area displays a table of PR Lines. One row is selected, showing Line 1, Item W510, Description W510 notebook, Quantity 6.00, Order Unit EACH, and Unit Cost 0.00. Below the table, there are several sections for Line Item details and a Charge To section. The Charge To section includes a field for Storeroom, which is set to ITHARDWARE.



Note: Charging to the ITHARDWARE storeroom puts the asset in the storeroom after it is received. It can then be issued from inventory.

58. Click the **Save Purchase Requisition** icon.

- ___ 59. Notice that the status of the Purchase Requisition is APPR (Approved). The workflow used automatically approves the purchase request when it is less than \$100,000.

View Record List > 1017

PR: 1017 Site: PMSCRTTP Status: APPR

PR Lines Ship To / Bill To Terms and Conditions Specifications

Purchase request for W510 Notebooks for WO 1156 and inv

- ___ 60. Write down the PR number: _____.

Now that you created the purchase requisition, you can mark the **Create Purchase Request for New Asset** task complete.

- ___ 61. Click the **Start Center** icon to return to the Inventory Administrator Start Center.
- ___ 62. Open the **Create Purchase Request for New Asset** task in the Open Tasks for Inventory Admin portlet.
- ___ 63. Click the **Complete Activity** icon and set the status to **Completed**.
- ___ 64. Click the **Start Center** icon to return to the Inventory Administrator Start Center.
- ___ 65. Notice that there is a new task in the Open Tasks for Inventory Admin portlet to issue the asset. You complete that task in the next unit. The next step is for the financial analyst to create and approve the purchase order for the asset.

| Activity | Summary | Status | Reported Date |
|----------|--|--------|-------------------|
| WO1370 | Issue Std Desktop from Inventory to Work Order | INPRG | 7/19/11 10:34:39 |
| W01373 | Issue Std Laptop from Inventory to Work Order | INPRG | 7/19/11 10:46:12 |
| W01427 | Issue Cisco 6500 from Inventory to Work Order | INPRG | 8/10/11 13:57:05 |
| TUSC1195 | Issue Asset from Inventory to Work Order | APPR | 12/23/11 14:41:40 |
| 1158 | Issue Asset from Inventory to Work Order | INPRG | 8/31/12 17:37:28 |

- ___ 66. Sign out of the console.

Exercise 3-2: Creating and awarding a request for quotation

This exercise demonstrates how to create a request for quotations. After receiving the quotations from vendors, you can award the business to the vendor with the best price.

- ___ 1. Log in to the console as **arun** with the password **object00**.
- ___ 2. Click the **Financial Analyst** Start Center tab.

- ___ 3. Notice that there are 2 approved PRs in **Approved Purchase Requests** portlet. Typically, the next step is to create purchase orders. However, before that step is completed, the financial analyst can do some research to ensure that the best price is being obtained.

The screenshot shows a software interface titled "Approved Purchase Requests". At the top, there are buttons for "Filter", "Search", and "New". Below the title is a table with three columns: "PR", "Description", and "Company". The table contains two rows of data:

| PR | Description | Company |
|------|---|-----------|
| 1016 | Generated by reorder 8/31/12 17:21:25. | COMPDEPOT |
| 1017 | Purchase request for W510 Notebooks for WO 1156 and inventory replenishment | |

At the bottom left is a link "Set Graph Options" and at the bottom right is the text "1 - 2 of 2".

- ___ 4. Open the PR for the W510 asset order.
___ 5. Click the **PR Lines** tab and review what is being requested. The financial analyst decided to obtain price quotations for this order.
___ 6. Click **Go To Applications > Purchasing > Request for Quotations** in the navigation bar.
___ 7. Click the **New RFQ** icon.

- ___ 8. Write down the RFQ number: _____.
- ___ 9. Enter **W510 Price Quote** in the Description field.
- ___ 10. Enter [*2 weeks from today's date*] in the Required Date field to indicate the date when the line items are needed.
- ___ 11. Enter [*1 week from today's date*] in the Reply Date field to indicate the date by which the vendor should reply.
- ___ 12. Enter [*today's date*] in the Printed Date field to indicate the date on which the RFQ was sent to the vendor.
- ___ 13. Enter [*2 weeks from today's date*] in the Close Date field to indicate the date when no further quotations are accepted from vendors.

The screenshot shows the 'RFQ' tab selected in the navigation bar. The main area contains three panels: 'Details', 'Dates', and 'Terms'. In the 'Details' panel, fields include 'Requested By' (ARUN), 'Buyer' (empty), 'Priority' (0), 'Entered By' (ARUN), and 'Type' (empty). In the 'Dates' panel, fields include 'Required Date' (9/14/12 18:01:59), 'Reply Date' (9/7/12), 'Printed Date' (8/31/12 18:01:59), 'Close Date' (9/14/12), and 'Status Date' (8/31/12 18:01:59). In the 'Terms' panel, fields include 'Freight Terms' (empty), 'Ship Via' (empty), 'Payment Terms' (empty), and 'FOB Point' (empty). At the top, there are buttons for 'Save RFQ' (highlighted in yellow), 'Cancel', and 'Print'.

- ___ 14. Click the **Save RFQ** icon.
- ___ 15. Click the **RFQ Lines** tab.
- ___ 16. Click **Copy PR Line Items to RFQ** under More Actions in the navigation bar.

- _____ 17. Select the PR Line from the W510 notebook request and click **OK**.

| PR | Company | Item | Description | Quantity | Storeroom | Work Order | Requested By | Required Date | Copy |
|------|------------------------|------|--|----------|------------|------------|--------------|---------------|-------------------------------------|
| 1016 | COMPDEPOT XEROXHCTONER | | Xerox High-Capacity Toner cartridge 4100 pages | 10.00 | ITHARDWARE | | ELMO | 9/1/12 | <input type="checkbox"/> |
| 1017 | | W510 | W510 notebook | 6.00 | ITHARDWARE | | ELMO | 9/14/12 | <input checked="" type="checkbox"/> |

OK **Cancel**

Copy PR Line Items to RFQ

- _____ 18. Click the **Vendors** tab.
- _____ 19. Click **New Row** in the RFQ Vendors section.
- _____ 20. Enter **COMPWLD** in the Vendor field for the first vendor.
- _____ 21. Click **New Row** in the RFQ Vendors section.

| Vendor | Description | Contact | Phone | Fax |
|---------|----------------|------------|-------|-----|
| COMPWLD | Computer World | Kurt Smith | | |

Details

* Vendor: Computer World

Contact:

Customer #:

Phone:

Fax:

E-mail:

* Currency:

Ship Via:

FOB Point:

Payment Terms:

Freight Terms:

Pay Tax to Vendor?

Vendor Quote #:

Vendor Reply Date:

Create PO **Create Contract** **New Row**

- ___ 22. Enter **LENOVO** in the Vendor field for the second vendor.

| Vendor | Description | Contact | Phone | Fax |
|---------|----------------|-------------------------|---------------|-----|
| COMPWLD | Computer World | Kurt Smith | | |
| LENOVO | Lenovo US | Lenovo Accounts Payable | 1-866-968-446 | |

Details

* Vendor: LENOVO > Lenovo US

Contact: Lenovo Accounts Payable

Customer #:

Ship Via: []

FOB Point: []

Payment Terms: []

- ___ 23. Click the **Sent to Vendors** icon and set the status to **Sent to the Vendor**.

After you receive the quotations, you enter them on the Quotations tab to have a complete record of the quotations. After you enter all the quotations, you can compare them and award the lines based on the comparison.

- ___ 24. Click the **Quotations** tab.

- ___ 25. Click **COMPWLD** in the **Vendors** section to select it.

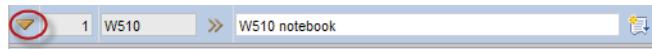
- ___ 26. Click **Select RFQ Lines** in the Quotations for Vendor section.

- ___ 27. Select the **W510** RFQ Line and click **OK**.

| Line | Item | Description | Storeroom | Quantity | Order Unit | Conversion Factor | Location | GL Debit Acc |
|------|------|---------------|-------------|----------|------------|-------------------|----------|--------------|
| 1 | W510 | W510 notebook | IT HARDWARE | 6.00 | EACH | 1.00 | | |

OK Cancel

___ 28. Click the **View Details** icon for the vendor quotation.



___ 29. Enter the following details.

| Field | Value |
|------------------|-----------------------|
| Order Unit | EACH |
| Unit Cost | 1200 |
| Quote Start Date | [Today's date] |
| Quote End Date | [One week from today] |

| | | | |
|--------------------|----------------------|-------------------|----------|
| Line: | 1 | Manufacturer: | |
| Line Type: | Item | Model: | |
| Item: | W510 > W510 notebook | Category: | |
| Remarks: | STK | | |
| Catalog #: | | | |
| Quantity and Costs | | Base Costs | Details |
| Currency: | USD | Currency: | USD |
| Quantity: | 6.00 | Unit Cost: | 1,200.00 |
| * Order Unit: | EACH | Line Cost: | 7,200.00 |
| Unit Cost: | 1,200.00 | Tax Amount: | 0.00 |
| Line Cost: | 7,200.00 | Awarded? | |
| | | Quote Start Date: | 8/31/12 |
| | | Quote End Date: | 9/7/12 |
| | | Delivery Date: | |
| | | Delivery Time: | |

___ 30. Click the **Save RFQ** icon.

- ___ 31. Click **LENOVO** in the Vendors section to select it.

The screenshot shows two main sections. The top section, 'Vendors', lists two entries: 'COMPWLD' and 'LENOVO'. The 'LENOVO' row is highlighted with a red oval. The 'Description' column for LENOVO contains 'Lenovo US'. The 'Contact' column shows 'Kurt Smith'. The 'Phone' column is '1-866-968-446'. The bottom section, 'Quotations for Vendor', has a header row with columns: Line, Item, Description, Manufacturer, Quantity, Order Unit, Currency, Unit Cost, Base Currency, Base Unit Cost, and Awarded?. Below the header, it says '...No row [Currency]...'. At the bottom of this section are buttons for 'Select RFQ Lines' and 'Award All'.

- ___ 32. Click **Select RFQ Lines** in the Quotations for Vendor section.

- ___ 33. Select the **W510** RFQ Line and click **OK**.

- ___ 34. Click the **View Details** icon for the vendor quotation.

- ___ 35. Enter the following values for Lenovo.

| Field | Value |
|------------------|-----------------------|
| Order Unit | EACH |
| Unit Cost | 1100 |
| Quote Start Date | [Today's date] |
| Quote End Date | [One week from today] |

- ___ 36. Click the **Save RFQ** icon.

- ___ 37. Click the **Item** subtab on the **Quotations** tab.

The screenshot shows two main sections. The top section, 'Items', has a subtab 'Item' which is circled in red. It lists one item: 'W510' with the description 'W510 notebook'. The bottom section, 'Quotations for Item', lists two quotes: one from 'COMPWLD' with a unit cost of 1,200.00 USD and another from 'LENOVO' with a unit cost of 1,100.00 USD. Both quotes have an order unit of 'EACH'.

- ___ 38. Compare the quotes.

- _____ 39. Click the **Vendor** subtab on the **Quotations** tab.

You can award quotation lines to a vendor on the Quotations tab in the RFQ application. You can award individual line items to different vendors, or you can award all quoted line items to a single vendor.

- _____ 40. Select **LENOVO** in the Vendors section.

- _____ 41. Select the **Awarded** option for the line item in the Quotations for Vendor LENOVO section.

| Description | Contact | Phone | Fax |
|----------------|-------------------------|---------------|-----|
| Computer World | Kurt Smith | | |
| Lenovo US | Lenovo Accounts Payable | 1-866-968-446 | |

| Description | Manufacturer | Quantity | Order Unit | Currency | Unit Cost | Base Currency | Base Unit Cost | Awarded? |
|---------------|--------------|----------|------------|----------|-----------|---------------|----------------|-------------------------------------|
| W510 notebook | | 6.00 | EACH | USD | 1,100.00 | USD | 1,100.00 | <input checked="" type="checkbox"/> |

- _____ 42. Click the **Save RFQ** icon. The quotation is awarded to LENOVO.

- _____ 43. Click the **Start Center** icon to return to the Financial Analyst start center.

Exercise 3-3: Creating purchase orders

This exercise demonstrates how to create purchase orders for the purchase requisitions that you created in the previous exercise.

Creating a purchase order from a purchase requisition

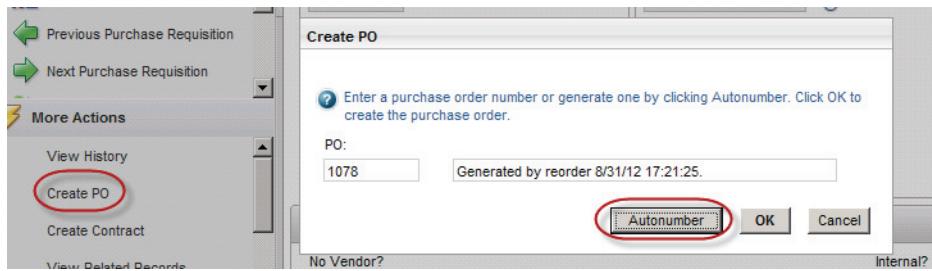
- _____ 1. Find and open the purchase requisition for toner in the Approved Purchase Request portlet. You recorded its number in Exercise 3-1, “Creating and approving a purchase requisition” on page 3-1.

| PR | Description | Company |
|------|---|-----------|
| 1016 | Generated by reorder 8/31/12 17:21:25. | COMPDEPOT |
| 1017 | Purchase request for W510 Notebooks for WO 1156 and inventory replenishment | |

___ 2. Click **Create PO** under More Actions in the navigation bar.

___ 3. Click **Autonumber**.

The PO record is generated with an automatically assigned number.



___ 4. Write down the PO number: _____.

___ 5. Click **OK**.

___ 6. Notice that the PR status changed to **CLOSE (Closed)**.

___ 7. Click the **Start Center** icon to return to the Financial Analyst start center.

Creating a purchase order from an RFQ

To create a purchase order from the RFQ, perform the following steps:

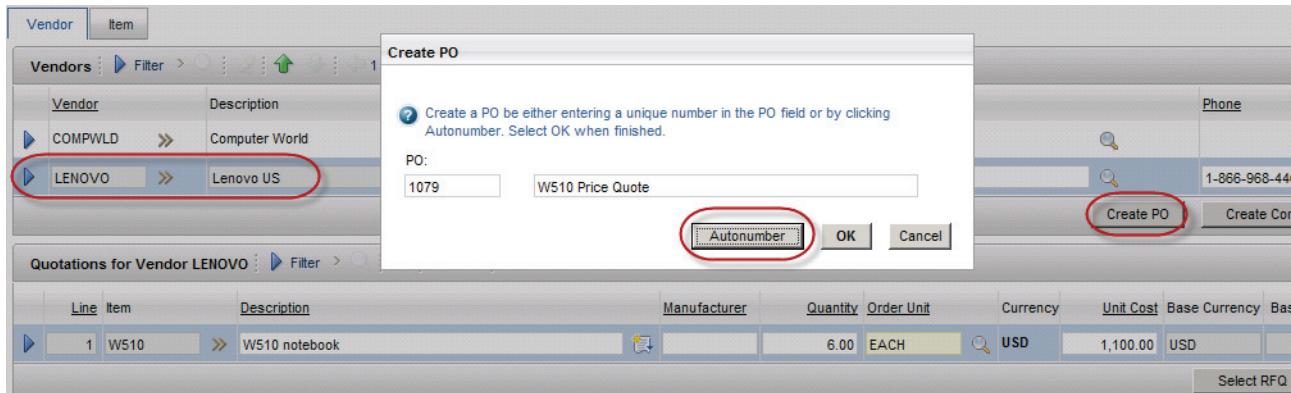
___ 8. Click **Purchasing > Request for Quotations** in the navigation bar.

___ 9. Find and open the RFQ you created in Exercise 3-2, “Creating and awarding a request for quotation” on page 3-12.

___ 10. Click the **Quotations** tab.

___ 11. Click **LENOVO** to select it.

____ 12. Click **Create PO** and click **Autonumber**.



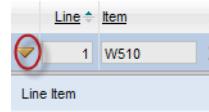
____ 13. Write down the PO number: _____.

____ 14. Click **OK**.

____ 15. Notice that the RFQ status is changed to **CLOSE (Closed)**.

____ 16. Click the **RFQ Lines** tab.

____ 17. Click the **View Details** icon for the RFQ Line.



____ 18. Verify that the PO is listed in the Related Records section.

| Charge To | Related Records | Details |
|----------------------------|--------------------------|-----------------------------------|
| Storeroom: ITHARDWARE > | Requisition: [] | Entered By: ARUN |
| Work Order: [] > | Requisition Line: [] | Entered Date: 8/31/12 18:06:35 |
| WO Task: [] | PO: 1079 > | Requested By: ELMO |
| Location: [] > | PO Line: 1 | Required Date: 9/14/12 |
| Asset: [] > | Contract: [] > | Supervisor: [] > |
| GL Debit Account: [] | Contract Line: [] | Awarded Vendor: LENOVO |
| | Contract Type: [] | Awarded Date: |

____ 19. Click the **Start Center** icon to return to the Financial Analyst start center.

Exercise 3-4: Approving a purchase order

The purchase orders that you created in the previous exercise are in the Waiting for Approval status. After a purchase order is approved, it can be sent to the appropriate vendor. This exercise demonstrates how to review, modify, and approve purchase orders.

- ___ 1. Click **Purchase Orders** in the Procurement Applications portlet.



- ___ 2. Find and open the purchase order for the toner. You wrote down the PO number in Exercise 3-3, “Creating purchase orders” on page 3-19 Step 4.
- ___ 3. Review the purchase order. Notice that the vendor is defined. However, the unit cost is not set. The financial analyst can look up the current price for COMPDEPOT and define it in the purchase order.
- ___ 4. Click the **PO Lines** tab.
- ___ 5. Enter **55** for the Unit Cost.

| PO Lines | | | | | | |
|----------|------------|---|----------|------------|-----------|-----------|
| Line | Item | Description | Quantity | Order Unit | Unit Cost | Line Cost |
| 1 | XEROXHCTON | Xerox High-Capacity Toner cartridge 4100 pa | 10.00 | EACH | 55.00 | 550.00 |

- ___ 6. Click the **Approve Purchase Order** icon and set the status to **Approved**.
- ___ 7. Click **View Record List** to return to the list of purchase orders.
- ___ 8. Find and open the purchase order for the W510. You wrote down the PO number in Exercise 3-3, “Creating purchase orders” on page 3-19 Step 13.
- ___ 9. Notice that the cost and vendor are both defined. They were defined when you processed the RFQ.
- ___ 10. Click the **Approve Purchase Order** icon and set the status to **Approved**.
- ___ 11. Sign out of the console.

Exercise 3-5: Receiving assets

This exercise demonstrates how to receive assets after they are purchased.

Receiving the toner (a nonrotating asset)

A nonrotating asset is received into inventory. It is not assigned an asset number because you do not need to track it after it leaves inventory.

- ___ 1. Log in to the console as **maria** with the password **object00**. Maria is a Receiver.
- ___ 2. Click the **Receiving Manager** Start Center tab.
- ___ 3. Verify that the purchase orders you created for the toner and W510 notebook are listed in the PO's waiting Receipt portlet. You might have to go to the second page.

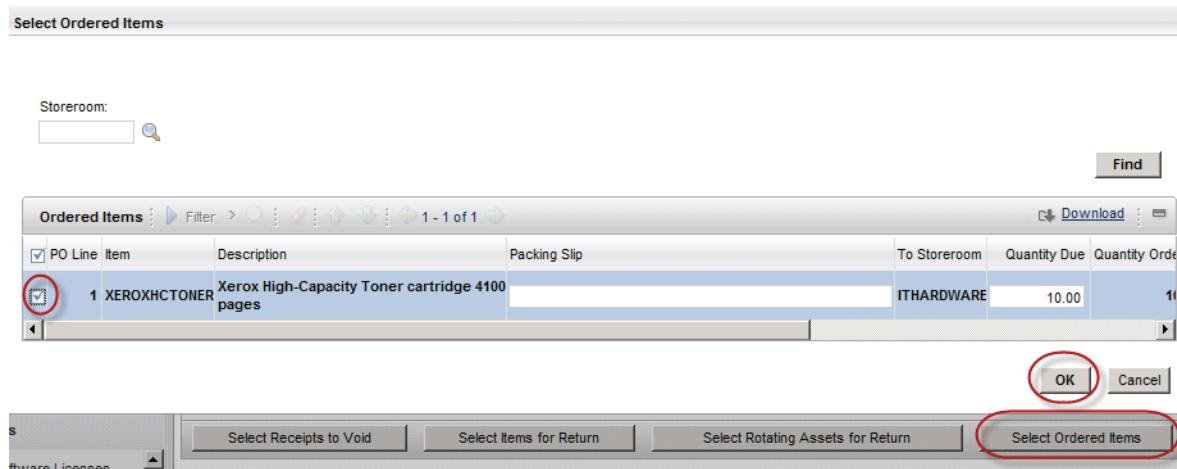
The screenshot shows two main sections. The top section is titled 'Inbox / Assignments' with columns for Description, Due Date, Priority, Start Date, and Route. A message says 'No Assignments found for Maria Asset Receiver'. The bottom section is titled 'PO's waiting Receipt' with columns for PO, Description, Company, Priority, Required Date, and Ship To. It lists two purchase orders: PO 1078 (Generated by reorder 8/31/12 17:21:25) and PO 1079 (W510 Price Quote). The company is COMPDEPOT, priority is 0, required date is 9/14/12 18:01:59, and ship to location is HQ. Navigation links at the bottom include 'Set Graph Options', '<< Previous Page | 11 - 12 of 12', and a refresh button.

| Description | Due Date | Priority | Start Date | Route |
|---|----------|----------|------------|-------|
| No Assignments found for Maria Asset Receiver | | | | |

| PO | Description | Company | Priority | Required Date | Ship To |
|------|--|-----------|----------|------------------|---------|
| 1078 | Generated by reorder 8/31/12 17:21:25. | COMPDEPOT | 0 | | HQ |
| 1079 | W510 Price Quote | LENOVO | 1 | 9/14/12 18:01:59 | HQ |

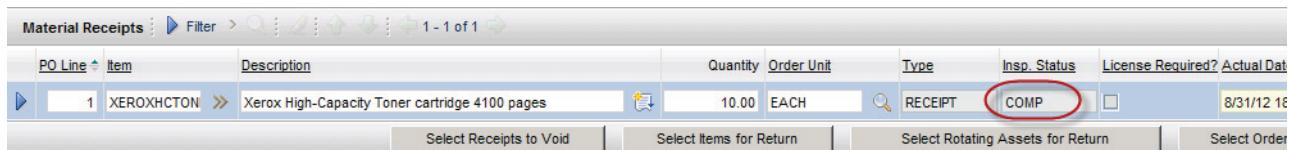
- ___ 4. Open the PO for the toner.
- ___ 5. Click **Select Ordered Items** on the Material Receipts tab to copy the list of Purchase Order line items that you ordered.

- ___ 6. Select the **PO Line** for the toner and click **OK**. Line items are copied over to the Materials Receipts tab.



- ___ 7. Click the **Save Receipt** icon.

The Receipts status is automatically changed to **COMP** (Completed).



- ___ 8. Click **Go To Applications > Inventory > Inventory**.

- ___ 9. Find the **XEROXHCTONER** item.

- ___ 10. Notice that the current balance is now **15**. In Exercise 2-12, “Working with items in inventory” on page 2-23, you saw that the current balance was 5. In that exercise, you also set the reorder quantity to 10. That quantity was entered into the purchase order. Therefore, when Maria received the toner PO, the balance was incremented by 10.

- ___ 11. Open the **XEROXHCTONER** item.

- ___ 12. Click **View Vendor Analysis** under More Actions in the navigation bar. Vendors, last price, and other information is displayed.

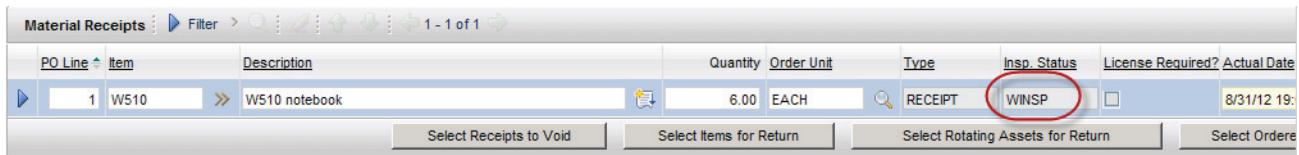
- ___ 13. Click **OK** to close the View Vendor Analysis window.

Receiving the notebook (a rotating asset)

Rotating assets are tracked through their lifecycle. Therefore, they must be assigned an asset record number. They are also typically inspected on receipt to ensure that there is no damage.

- ___ 14. Click the **Start Center** icon to return to the **Receiving Manager** start center.
- ___ 15. Find and open the purchase order for the W510 notebooks in the PO's waiting Receipt portlet.
- ___ 16. Click **Select Order Items** on the Material Receipts tab to copy the list of Purchase Order line items that you ordered.
- ___ 17. Select the **PO Line** for the W510 notebooks and click **OK**.

The Insp. Status field is automatically changed to **WINSP** (Waiting Inspection) indicating that these items must be inspected. Items with the **Inspect on Receipt** option set must be inspected when they are received.



| PO Line | Item | Description | Quantity | Order Unit | Type | Insp. Status | License Required? | Actual Date |
|---------|------|---------------|----------|------------|---------|--------------|-------------------|-------------|
| 1 | W510 | W510 notebook | 6.00 | EACH | RECEIPT | WINSP | | 8/31/12 19: |

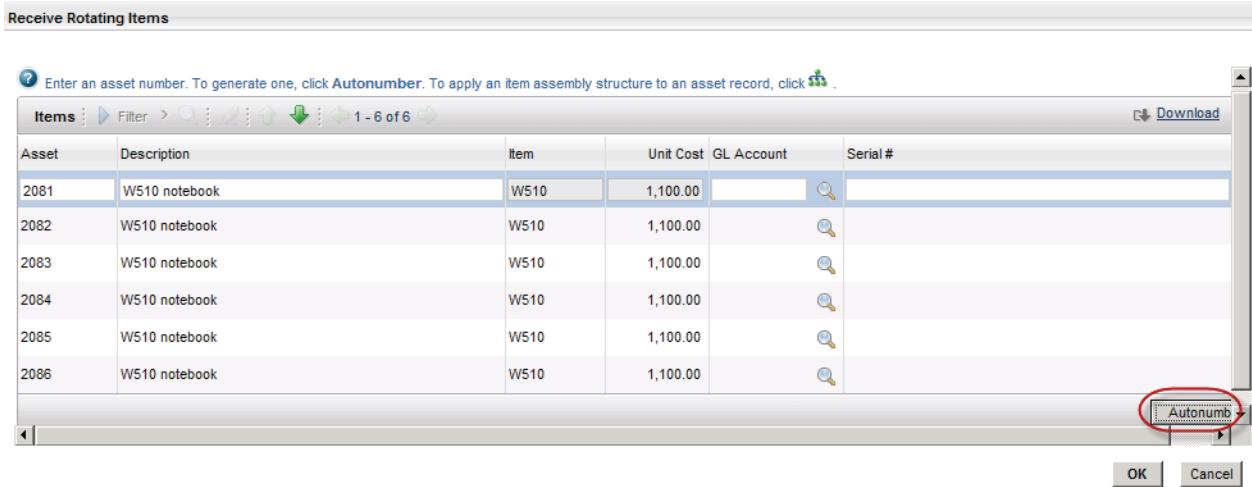
- ___ 18. Click the **Save Receipt** icon.
- ___ 19. Click **Change Inspection Status** under More Action in the navigation bar.
The Change Inspection Status window opens. In this window, you can accept or reject any number of the items received.
- ___ 20. Select the PO Line and leave the Quantity Accepted at **6**. If during inspection you found a problem with one or more of the assets, you can change the quantity accepted value.



| Change Inspection Status | | | | | |
|--|---------|------------------|---------------|-------------------|-----------------|
| Material Receipts | | Service Receipts | | | |
| Material Receipts Filter 1 - 1 of 1 Download | | | | | |
| <input checked="" type="checkbox"/> | PO Line | Item | Inspected Qty | Quantity Accepted | Reject Quantity |
| <input checked="" type="checkbox"/> | 1 | W510 | 6.00 | 6.00 | 0.00 |

- ___ 21. Click **OK** to update the inspection status.
The Inspection Status is changed to **WASSET** (Waiting for Serialization) indicating that this item is a rotating item that is waiting to be assigned an asset number.
- ___ 22. Click **Receive Rotating Items** under More Action in the navigation bar.
The Receive Rotating Items window opens, showing the 6 notebooks that you received.
- ___ 23. Click **Autonumber**.

The assets are automatically numbered.



___ 24. Write down the range of asset numbers for the notebooks.

Notebook asset #1–asset #6 (for example, 2081 - 2086):

___ 25. Click **OK**.

The Material Receipt tab shows the items received and transferred to the ITHARDWARE location.

___ 26. Click **Go To Applications > Inventory > Inventory**.

___ 27. Find the **W510** item.

___ 28. Notice that there are now six W510 notebooks in inventory.

___ 29. Open the **W510** item.

___ 30. Click the **Rotating Assets** tab.

The assets that you received are listed.

The screenshot shows a software interface titled "View Record List > W510". At the top, there are tabs: "Inventory", "Reorder Details", "Rotating Assets", and "Where Used". The "Where Used" tab is selected. Below the tabs, there are fields for "Item" (W510) and "Site" (PMSCRTP). A search bar contains "W510 notebook". The main area is titled "Associated Assets" and displays a table of 6 items:

| Asset | Location | Description | Location Type | Bin |
|-------|-------------|-------------|---------------|-----|
| 2086 | IT HARDWARE | IT Hardware | STOREROOM | |
| 2085 | IT HARDWARE | IT Hardware | STOREROOM | |
| 2084 | IT HARDWARE | IT Hardware | STOREROOM | |
| 2083 | IT HARDWARE | IT Hardware | STOREROOM | |
| 2082 | IT HARDWARE | IT Hardware | STOREROOM | |
| 2081 | IT HARDWARE | IT Hardware | STOREROOM | |

- ____ 31. Sign out of the console.

Exercise 3-6: Creating an invoice

This exercise demonstrates how to enter a vendor invoice for the purchase orders that you received.

Creating an invoice for the toner

- ____ 1. Log in to the console as **arun** with the password **object00**.
- ____ 2. Click **Purchasing > Invoices** in the navigation bar.
- ____ 3. Click the **New Invoice** icon.
- ____ 4. Write down the invoice number: _____.

___ 5. Enter the following values for the invoice.

| Field | Value |
|----------------|------------------------------------|
| Description | Toner reorder |
| Vendor Invoice | 158 |
| PO | [Enter the PO for the toner order] |

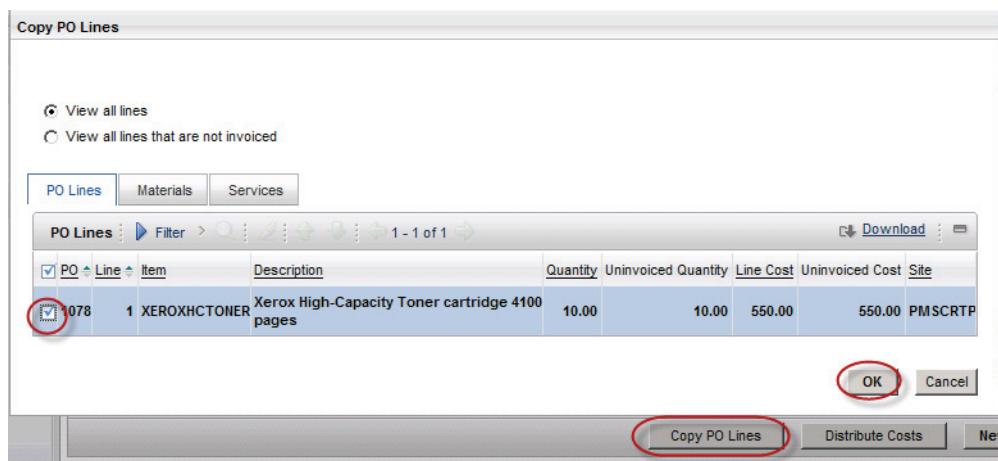
View Record List > 1054

| | | | |
|--------------------|---------------|----------------------|--------------------|
| Invoice | Invoice Lines | Terms and Conditions | Specifications |
| * Invoice: 1054 | Toner reorder | Site: PMSCRTP | * Type: INVOICE |

| | | |
|------------------------|-----------------------|---|
| Invoice Details | PO Details | Dates |
| Original Invoice: » | PO: 1078 | Contract Reference: » |
| Reverse Invoice: » | Site: PMSCRTP | Contract Type: » |
| Vendor Invoice: 158 | Company: COMPDEPOT | Contract Reference Revision: » |
| Approval #: | Currency: USD | Payment Schedule: » |
| * Entered By: ARUN | Buyer: » | Entered Date: 8/31/12 19:15:34 |
| | Receipts: COMPLETE | Invoice Date: » |
| | | * G/L Posting Date: 8/31/12 19:15:34 |
| | | Due Date: » |
| | | Paid Date: » |

___ 6. Click the **Invoice Lines** tab.

- ____ 7. Click **Copy PO Lines**.
____ 8. Select the PO Line and click **OK**.



- ____ 9. Click the **Save Invoice** icon.
The invoice status is automatically changed to **ENTERED** (Entered).

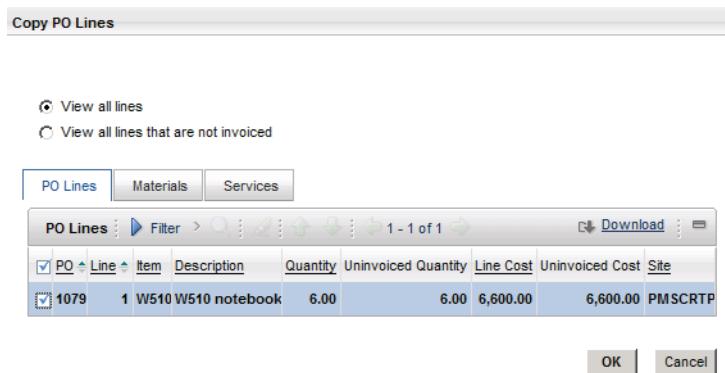
Creating an invoice for the notebooks

- ____ 10. Click the **New Invoice** icon.
____ 11. Write down the invoice number: _____.
____ 12. Enter the following values for the invoice.

| Field | Value |
|----------------|-----------------------------------|
| Description | W510 notebooks |
| Vendor Invoice | 233 |
| PO | [Enter the PO for the W510 order] |

- ____ 13. Click the **Invoice Lines** tab.

- ___ 14. Click **Copy PO Lines**.
- ___ 15. Select the PO Line and click **OK**.



- ___ 16. Click the **Save Invoice** icon.
The invoice status is automatically changed to **ENTERED** (Entered).

Exercise 3-7: Approving an invoice and paying the invoice

This exercise demonstrates how to approve and pay an invoice.

- ___ 1. Verify that you are viewing the invoice for the W510 notebooks. If not, click **Purchasing > Invoices** in the navigation bar and open the invoice for the W510 notebooks.
- ___ 2. Click the **Approve Invoice** icon.
- ___ 3. Set the status to **Approved** and click **OK**.

An error is displayed indicating that the cost of the invoice exceeds the approval limit. The purchasing limits for users are controlled by settings in the security group. The next few steps demonstrate how to set the purchasing limits.



- ___ 4. Click **OK** to dismiss the error.
- ___ 5. Click **OK** to close the change status.

- ___ 6. Sign out of the console.
- ___ 7. Log in to the console as **maxadmin** with the password **object00**.
- ___ 8. Click **Security > Security Groups** in the navigation bar.
- ___ 9. Find and open the **ITAMFINMGR** group. Arun, the financial manager, is a member of that group.
- ___ 10. Click the **Limits and Tolerances** tab.
- ___ 11. Click the **View Details** icon for the PMSCIBM organization. Limits and tolerances are set at the organization level for each security group.
- ___ 12. Scroll to the **Limits** section.
- ___ 13. Notice that the PR and PO limits are set to **1,000,000**. These settings allowed you to create the purchase orders without error.

| Organization | Description | Base Currency 1 |
|--------------|----------------------------|-----------------|
| PMSCIBM | PMSCIBM Inc. North America | USD |

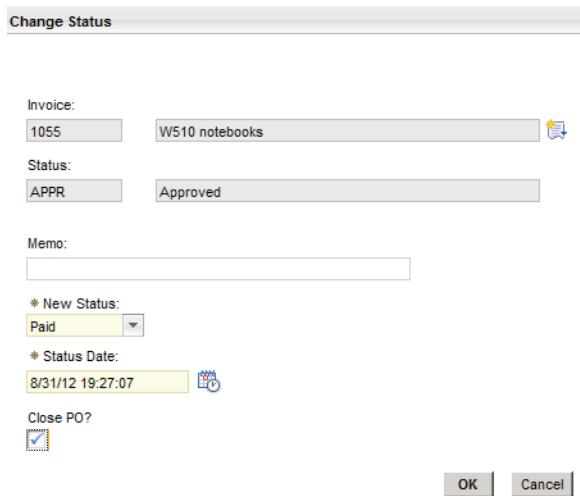
| Limits | |
|-----------------|--|
| PR Limit: | <input type="text" value="1,000,000"/> |
| PO Limit: | <input type="text" value="1,000,000"/> |
| MR Limit: | |
| Invoice Limit: | <input type="text" value="0"/> |
| Contract Limit: | <input type="text" value="0"/> |

- ___ 14. Enter **1,000,000** for the Invoice and Contract limits.

| Limits | |
|-----------------|--|
| PR Limit: | <input type="text" value="1,000,000"/> |
| PO Limit: | <input type="text" value="1,000,000"/> |
| MR Limit: | |
| Invoice Limit: | <input type="text" value="0"/> |
| Contract Limit: | <input type="text" value="0"/> |

- ___ 15. Click the **Save Group** icon.

- ___ 16. Sign out of the console.
- ___ 17. Log in to the console as **arun** with the password **object00**.
- ___ 18. Click **Purchasing > Invoices** in the navigation bar.
- ___ 19. Find and open the invoice for the W510 notebooks.
- ___ 20. Click the **Approve Invoice** icon.
- ___ 21. Set the status to **Approved** and click **OK**.
The invoice status is now APPR (Approved).
- ___ 22. Verify that the system automatically calculated the values for the Pretax Total, Total Tax, and Invoice Total fields in the Costs section on the Invoice tab.
- ___ 23. Click the **Paid Invoice** icon.
- ___ 24. Set the status to **Paid** and select the **Close PO** option.



- ___ 25. Click **OK**.
The transaction date is added to the Paid Date field, and the Status is changed to **PAID**.
- ___ 26. Click **View Record List** to return to the list of invoices.
- ___ 27. Find and open the invoice for the toner.
- ___ 28. Click the **Approve Invoice** icon.
- ___ 29. Set the status to **Approved** and click **OK**.
The invoice status is now **APPR** (Approved).
- ___ 30. Verify that the system automatically calculated the values for the Pretax Total, Total Tax, and Invoice Total fields in the Costs section on the Invoice tab.

-
- ___ 31. Click the **Paid Invoice** icon.
 - ___ 32. Set the status to **Paid** and select the **Close PO** option.
 - ___ 33. Click **OK**.

The transaction date is added to the Paid Date field, and the Status is changed to **PAID**.

- ___ 34. Sign out of the console.
- ___ 35. Tell your instructor that you are finished with the unit exercises.

Student exercises for Unit 4

In this unit, you continue working with the IT asset lifecycle. In the planning and acquisition units, you defined the item master for hardware that was leased, procured, and received. During the deployment phase, you manage the tasks to deploy this hardware into the IT environment. You explore functions that are provided in the Asset and Inventory applications to issue, move, and swap assets. You also learn more details about how to use the service request and work order features to ensure that the right people are engaged to perform the deployment tasks. If you need to understand how to create work orders and job plans, consider taking the *Tivoli's Process Automation Engine 7.5 Fundamentals* course.

Exercise 4-1: Issuing assets from inventory

In this exercise, you issue a W510 notebook that was requested for Bob and procured by Elmo in the acquisition unit. The W510 notebook was received into the ITHARDWARE storeroom in the acquisition phase of the lifecycle. To move assets from an inventory location, such as Storeroom, to an operating location, you must use the Issues and Transfers application. It is also possible to directly issue an asset to an operating location at the time of receipt instead of first being received into a storeroom location.

- ____ 1. Log in to the console as **elmo** with the password **object00**.
- ____ 2. Click the **Inventory Administrator** Start Center tab. Remember from the previous unit that the inventory administrator has a task to issue the asset for Bob's new asset request.
- ____ 3. Click **Inventory** in the Favorite Applications portlet.
- ____ 4. Press Enter to view all items in inventory.

There are now **6** W510 notebooks in inventory.

| Item | Description | Storeroom | Current Balance | Commodity Group | Rotating? |
|-------------------|--|-------------|-----------------|-----------------|-------------------------------------|
| ITAMT61 | Lenovo Thinkpad T61 | IT HARDWARE | 7.00 | 43211500 | <input checked="" type="checkbox"/> |
| ITAMM57P | Lenovo ThinkCentre M57p Desktop | IT HARDWARE | 7.00 | 43211500 | <input checked="" type="checkbox"/> |
| ITAMX61T | Lenovo X61 Thinkpad Tablet | IT HARDWARE | 10.00 | | <input checked="" type="checkbox"/> |
| ITAMCISCO PHONE | | IT HARDWARE | 0.00 | 43211800 | <input checked="" type="checkbox"/> |
| ITAMMONITOR | computer display | IT HARDWARE | 0.00 | | <input checked="" type="checkbox"/> |
| ITAMT40P | Lenovo Thinkpad T40P | IT HARDWARE | 2.00 | 43211500 | <input checked="" type="checkbox"/> |
| ITAMT60 | Lenovo Thinkpad T60 | IT HARDWARE | 0.00 | | <input checked="" type="checkbox"/> |
| XEROXHCTONER | Xerox High-Capacity Toner cartridge 4100 pages | IT HARDWARE | 15.00 | | <input type="checkbox"/> |
| W510 | W510 notebook | IT HARDWARE | 6.00 | | <input checked="" type="checkbox"/> |
| S3PORT_REPLICATOR | Thinkpad Series 3 Port Replicator | IT HARDWARE | 9.00 | | <input type="checkbox"/> |

- ___ 5. Open the **W510** item.
- ___ 6. Click **Issue Current Item** under More Actions in the navigation bar.
- ___ 7. Click the **Detail Menu** icon for the **Rotating Asset** field and click **Select Value**.

The screenshot shows the 'Details' panel of the software. On the left, there are fields for 'Quantity' (1.00), 'Transaction' (ISSUE selected), 'Issue Unit' (EACH), and 'Unit Cost' (1,100.00). To the right, there are fields for 'Requisition', 'Requisition Line', 'Location', 'GL Debit Account', and 'GL Credit Account'. A dropdown menu is open over the 'Rotating Asset' field, with the option 'Select Value' highlighted and circled in red. Other menu items include 'Open Drilldown', 'Classification', 'Attributes', 'View Contracts', 'View Work Details', and 'View Asset Details'.

- ___ 8. Click the first W510 asset that you received in the previous unit.

| Select Value | | | | | |
|--------------|---------------|------------|----------------|---------|--|
| Asset | Description | Location | Condition Code | Site | |
| 2086 | W510 notebook | ITHARDWARE | | PMSCRTP | |
| 2085 | W510 notebook | ITHARDWARE | | PMSCRTP | |
| 2084 | W510 notebook | ITHARDWARE | | PMSCRTP | |
| 2083 | W510 notebook | ITHARDWARE | | PMSCRTP | |
| 2082 | W510 notebook | ITHARDWARE | | PMSCRTP | |
| 2081 | W510 notebook | ITHARDWARE | | PMSCRTP | |

Cancel

- ___ 9. Write down the asset number: _____.

- ___ 10. Enter **SOUTHERN** for the **Location** and click **OK** to issue the item.

Issue Current Item

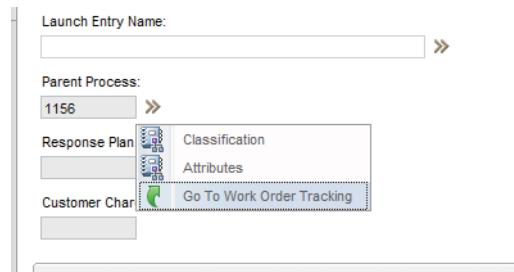
| | | |
|---------------------|-----------------------|--|
| Storeroom | | Rotating? <input checked="" type="checkbox"/> |
| Item: | W510 >> W510 notebook | Lot: |
| * Storeroom: | ITHARDWARE >> | Expiration Date: |
| Site: | PMSCRTP | Condition Code: |
| Bin: | <input type="text"/> | |
| Details | | |
| Quantity: | 1.00 | Requisition: |
| * Transaction Type: | ISSUE | Requisition Line: |
| Issue Unit: | EACH | Location: |
| * Rotating Asset: | 2081 >> | GL Debit Account: |
| Unit Cost: | 1,100.00 | GL Credit Account: |

OK **Cancel**

- ___ 11. Click the **Start Center** icon to return to the Inventory Administrator Start Center.

- ___ 12. Find and open the **Issue Asset from Inventory to Work Order** task with *today's date* in the Open Tasks for Inventory Admin portlet.

- ___ 13. Click the **Detail Menu** for the **Parent Process** field and click **Go To Work Order Tracking**.



- ___ 14. Click the **Detail Menu** for the **Asset** field and click **Select Value**.
___ 15. Find and click the asset that you issued. You wrote down this asset number in Step 9. This step associates the asset with the New Asset Request work order.

- ___ 16. Click the **Save Work Order** icon.
___ 17. Click **Return**.
___ 18. Click the **Detail Menu** for the **Asset** field and click **Select Value**.
___ 19. Find and click the asset that you issued. This step associates the asset with the Issue Asset from Inventory to Work Order task.
___ 20. Click the **Save Activity** icon.
___ 21. Click **Move/Swap/Modify** under More Actions in the navigation bar.

- ___ 22. Click the **Users and Custodians** tab.
- ___ 23. Click **New Row**.
- ___ 24. Enter **Bob** in the **Person** field.
- ___ 25. Select **Will be User** and **Will be Primary**.

The screenshot shows the 'Move/Swap/Modify' interface. The 'Users and Custodians' tab is active. In the 'Person' column of the main table, 'BOB' is selected. In the 'Will be User?' and 'Will be Primary?' columns, the checkboxes are checked. The 'Asset' table shows an asset with ID 2081 and description 'W510 notebook'. The 'Details' panel shows the person assigned as 'BOB'. On the right, there are buttons for modifying, adding, or removing the assignment, along with class and record information. At the bottom, there are buttons for executing, saving as a plan, or canceling.

- ___ 26. Click **Save As Plan**. The changes are made when the work order is completed.
- ___ 27. Click the **Complete Activity** icon and set the status to **Completed**.
- ___ 28. Sign out of the console.

Exercise 4-2: Building and deploying an IT asset

After the IT asset is received and issued from inventory, it can be deployed. This job is typically performed by the hardware asset manager. This exercise demonstrates how to process the job tasks for building and deploying an IT asset.

- ___ 1. Log in to the console as **jake** with the password **object00**.
- ___ 2. Click the **Hardware Asset Mgr Start Center** tab.

- ___ 3. Find and open the **Build, Image, and Deliver New Asset** task with *today's date* in the Open Activities or Tasks for Asset Mgr portlet.

| Open Activities or Tasks for Asset Mgr | | | |
|--|--|--------|------------------|
| Activity | Summary | Status | Reported Date |
| WO1361 | Build, Image and Deliver Linux P510 Server | INPRG | 7/15/11 12:26:42 |
| WO1364 | Build, Image and Deliver X86 Win Server | INPRG | 7/15/11 12:42:13 |
| 1159 | Build, Image and Deliver New Asset | INPRG | 8/31/12 17:37:28 |

- ___ 4. Click the **Detail Menu** for the **Parent Process** field and click **Go To Work Order Tracking**.
- ___ 5. Verify that the asset that you received and issued is listed in the **Asset** field.
- ___ 6. Click **Return**.
- ___ 7. Click the **Detail Menu** for the **Asset** field and click **Select Value**.
- ___ 8. Find and click the asset that you received and issued.

View Record List > 1159

| | | | | | |
|----------------------|-----------|-----------------|--------------|-----|-----------------|
| Activities and Tasks | Resources | Related Records | Workplan Map | Log | Service Address |
|----------------------|-----------|-----------------|--------------|-----|-----------------|

WORKORDER

Task: 30 Build, Image and Deliver New Asset

Location: SOUTHERN > Southern Facility

Asset: 2081 > W510 notebook

License:

Configuration Item:

Configuration Item Name:

- ___ 9. Click the **Save Activity** icon.

At this point, Jake puts the standard company image on the notebook and delivers it to Bob.

- ___ 10. Click the **Complete Activity** icon and set the status to **Completed**.

Because the last activity is complete, the service request is resolved.

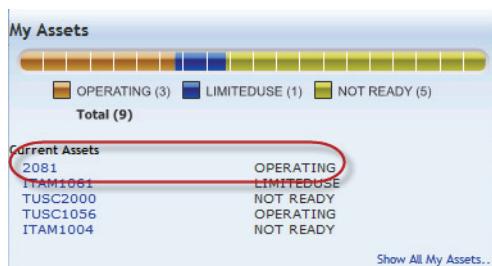
- ___ 11. Click **Close** to dismiss the system message.
- ___ 12. Click the **Start Center** icon to return to the Hardware Asset Mgr Start Center.
- ___ 13. Click **Assets** in the Favorite Applications portlet.

- ___ 14. Find and open the asset that you just received, issued, built, and deployed.



Note: Optionally, you can apply the item assembly structure and issue a port replicator with this asset. You learned this process in Unit 2.

- ___ 15. Click the **Change Status** icon and set the status to **Operating**. If you apply an item assembly structure, ensure that you roll the status change to the child assets.
- ___ 16. Sign out of the console.
- ___ 17. Log in to the console as **bob** with the password **object00**.
- ___ 18. Notice that the new asset is displayed in the My Assets pod.



- ___ 19. Sign out of the console.

Exercise 4-3: Modifying the technology refresh details

In this exercise, you review the Technology Refresh details for the W510 assets that you received in the acquisition unit, one of which you just issued. You use the Modify Refresh Date action to update refresh details for the 6 assets that you just received.

- ___ 1. Log in to the console as **jake** with the password **object00**.
- ___ 2. Click the **Hardware Asset Mgr Start Center** tab.
- ___ 3. Click **Assets** in the Favorite Applications portlet.

- ___ 4. Find and open the asset that you built and deployed for Bob.
- ___ 5. Click the **IT Details** tab and review the Technology Refresh section that was generated based on the Item Master entry that you created in the planning unit.

The screenshot shows the 'Technology Refresh' dialog box. It contains the following fields:

- Cycle (In Months): 48
- Qualified Refresh Date: 8/31/16
- Refresh Status: (button)
- Planned Refresh Date: (button)
- Refresh Remarks: (text area)

- ___ 6. Write down the qualified refresh date: _____.
- ___ 7. Click **View Record List** and click **Advanced Search**.
- ___ 8. Click **Restore Application Defaults**. This action clears all fields except the site field.
- ___ 9. Enter **W510** in the Rotating Item field.
- ___ 10. Enter the qualified refresh date that you noted in Step 6 in the From Qualified Refresh Date field.

The screenshot shows the 'Technology Refresh' search interface. The 'Qualified Refresh Date' field is highlighted with a red oval and contains the value 8/31/16. Other fields include 'From' and 'To' for refresh dates, 'Planned Refresh Date', 'Refresh Status', and 'End of Life'.

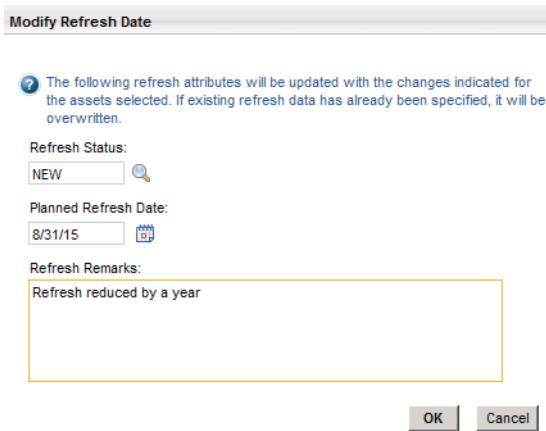
- ___ 11. Click **Find**.



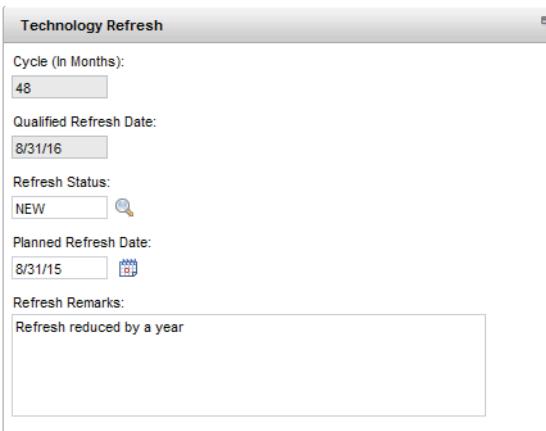
Note: All of the W510 assets that you imported or received in unit 2 and 3 are listed.

- ___ 12. Click **Modify Refresh Date** under More Actions in the navigation bar. A system message is displayed explaining that the action affects all assets in the search.
- ___ 13. Click **OK** to continue past the system message. The message indicates that the action affects all assets in the search results.

- ___ 14. Enter **NEW** in the Status field.
- ___ 15. Enter the date one year earlier than the current refresh date in the Planned Refresh Date field.
- ___ 16. Enter a note in the Refresh Remarks field ex planing that the refresh date was reduced by one year.



- ___ 17. Write down the new planned refresh date: _____.
- ___ 18. Click **OK**.
- ___ 19. Find and open the asset that you built and deployed for Bob.
- ___ 20. Click the **IT Details** tab.
- ___ 21. Review the updated Technology Refresh section. The planned refresh date is a year earlier than the qualified refresh date.



- ___ 22. Sign out of the console.

Exercise 4-4: Moving assets

This exercise demonstrates how to move assets from one location to another. Integration with service request management and work management are highlighted. The first part demonstrates requesting the move of a single asset and performing the steps in the process. The second part demonstrates a mass move of several assets.

Moving a single asset

- ___ 1. Log in to the console as **steve** with the password **object00**.
- ___ 2. Click the **All Users** Start Center tab.
- ___ 3. Click **IT Asset Move Request** in the Quick Insert portlet. This portlet is a Create Service Request action with the classification prepopulated with the Asset Move classification.



Note: If you are prompted to run the screen capture applet, select **Always trust content from this publisher** and click **Run**.



- ___ 4. Enter **3** for the Priority.
- ___ 5. Click the **Detail Menu** icon for the Affected Asset field and click **Select Value**.
A list of all assets that are associated with Steve is displayed.

- ___ 6. Click the **TUSC1057 Lenovo G550 Desktop** asset to select it.
- ___ 7. Enter **This asset needs to be moved to the Northern site for a project** for the Details.

The screenshot shows the 'Affected Asset Details' section of a software interface. It displays two asset paths: 'Affected Asset' (TUSC1057 > Lenovo G550 Desktop) and 'Affected Asset Location' (SOUTHERN > Southern Facility). Below these are sections for 'Affected Configuration Item' and 'Request Description'. The 'Request Description' section contains a rich text editor with the text 'This asset needs to be moved to the Northern site for a project' entered.

- ___ 8. Enter **SOUTHERN** for the Current Location and **NORTHERN** for the Move to Location in the Attributes section.
- ___ 9. Enter *2 days from today's date* in the Requested Move Date field and click **Submit**.

The screenshot shows the 'Attributes' section of the software. It lists five attributes: CURRLOC (Current Location) set to SOUTHERN, MOVETO (Move to Location) set to NORTHERN, REQDATE (Requested Move Date) set to 8/31/12, ADDLCONT (Additional Contacts), and SPECIALINST (Special Instructions). A 'Submit' button is visible at the bottom right.

- ___ 10. Click **View Details** to review the request.
- ___ 11. Sign out of the console.
- ___ 12. Log in to the console as **jake** with the password **object00**.
- ___ 13. Click the **Hardware Asset Mgr Start Center** tab.

- ___ 14. Find and open the **Request for Service, IT, Move/Swap Asset** service request *today's date* in the Open SR for Asset Mgr portlet.

| Service Request | Summary | Status | Reported Date |
|-----------------|--|--------|----------------------|
| SR1092 | IT Asset Move Request | INPROG | 4/21/11 14:00:14 |
| SR1160 | Asset Disposal Request | INPROG | 5/19/11 09:16:53 |
| TUSC1070 | Update Asset to New Owner | QUEUED | 12/23/11 13:29:51 |
| TUSC1072 | Asset update | QUEUED | 12/23/11 14:05:02 |
| TUSC1074 | New Location for Asset | QUEUED | 12/23/11 14:06:57 |
| TUSC1076 | Asset Update New Group | QUEUED | 12/23/11 14:07:47 |
| TUSC1078 | Asset status Update | QUEUED | 12/23/11 14:09:25 |
| TUSC1080 | Not Primary user | QUEUED | 12/23/11 14:11:03 |
| 1004 | Request for Service, IT, Move/Swap Asset | QUEUED | 8/31/12 21:05:25 |

- ___ 15. Review the service request. Notice that the details that Steve entered are copied into the service request. To initiate the move of the asset, Jake applies the IT Asset Move workflow.



Note: Creating and using workflows is covered in more depth in the *Tivoli's Process Automation Engine 7.5 Fundamentals* course.

- ___ 16. Click the **Route Workflow** icon.

- ___ 17. Select the **ITMOVESR: IT Move Service Request** Process and click **OK**.

The workflow presents three options: Create Work Order for IT Move Request, Reject IT Move Request, or Return to Start Center.

Start Workflow

There is more than one workflow process available for this application. Please select the one you want from the Process drop-down and press OK.

* Process: **ITMOVESR: IT**

Memo:

Previously Started Workflow Processes

| Process | Activation # | Description | Active Instance? |
|--------------------------|--------------|-------------|------------------|
| ...No rows to display... | | | |

OK Cancel

- ___ 18. Select **Create Work Order for the IT Move Request** and click **OK**.

- ___ 19. Review the work order. The workflow uses an action to create the work order. Information from the service request is copied over, and a job plan with tasks for moving an asset is

added to the work order. Notice that the Asset field is populated with the asset number. Also, the **ITAM_MOVE** job plan is added to the Job Details section.

The screenshot shows the 'Work Order' screen with various fields filled out. The 'Plans' tab is active. In the 'Job Details' panel, the 'Job Plan' dropdown is set to 'ITAM_MOVE' and is highlighted with a red circle. Other visible fields in this panel include 'Job Plan Revision #: 0', 'PM:', and 'Safety Plan:'. The 'Asset Details' panel contains fields like 'Asset Up?' (checked), 'Warranties Exist?', 'SLA Applied?', and 'Charge to Store?'. The 'Customer Accounting' panel includes 'Charge Account:' and 'Cost Center:'. The 'Priority' panel has fields for 'Asset/Location Pk', 'Priority:', 'Priority Justification', and 'Risk Assessment'.

_____ 20. Click the **Plans** tab.

The tasks for the work order are populated. These tasks are defined in the **ITAM_MOVE** job plan. The first two tasks are assigned to the inventory administrator. They must assess the impact and perform the physical move. The last task is for the hardware manager to update the asset information with the new location.

- _____ 21. Click the **Initiate Work Order** icon and set the status to **In Progress**. Notice that the first task in the plan is **INPROG** (In Progress).
- _____ 22. Click the **Start Center** icon to return to the Hardware Asset Mgr Start Center. Notice that the service request and work order are both in progress.
- _____ 23. Sign out of the console.

- ___ 24. Log in to the console as **elmo** with the password **object00**.
- ___ 25. Click the **Inventory Administrator** Start Center tab.
- ___ 26. Find and open the **Assess Impact & Verify Destination Location** task *today's date* in the Open Tasks for Inventory Admin portlet. Notice that the details of the asset were copied in to the task. At this point, Elmo physically evaluates the impact of the move and verifies the location.

| Open Tasks for Inventory Admin | | | |
|--------------------------------|--|--------|-------------------|
| Activity | Summary | Status | Reported Date |
| WO1370 | Issue Std Desktop from Inventory to Work Order | INPRG | 7/19/11 10:34:39 |
| WO1373 | Issue Std Laptop from Inventory to Work Order | INPRG | 7/19/11 10:46:12 |
| WO1427 | Issue Cisco 6500 from Inventory to Work Order | INPRG | 8/10/11 13:57:05 |
| TJSC1195 | Issue Asset from Inventory to Work Order | APPR | 12/23/11 14:41:40 |
| 1161 | Assess Impact & Verify Destination Location | INPRG | 8/31/12 21:22:09 |

- ___ 27. Click the **Complete Activity** icon and set the status to **Completed**.
- ___ 28. Click the **Start Center** icon to return to the Inventory Administrator Start Center. Notice that there is a new task, **Perform Physical Move**, in the Open Tasks for Inventory Admin portlet. This task is the second task in the job plan.
- ___ 29. Find and open the **Perform Physical Move** task *today's date* in the Open Tasks for Inventory Admin portlet. At this point, Elmo moves the asset to the new location.

| Open Tasks for Inventory Admin | | | |
|--------------------------------|--|--------|-------------------|
| Activity | Summary | Status | Reported Date |
| WO1370 | Issue Std Desktop from Inventory to Work Order | INPRG | 7/19/11 10:34:39 |
| WO1373 | Issue Std Laptop from Inventory to Work Order | INPRG | 7/19/11 10:46:12 |
| WO1427 | Issue Cisco 6500 from Inventory to Work Order | INPRG | 8/10/11 13:57:05 |
| TJSC1195 | Issue Asset from Inventory to Work Order | APPR | 12/23/11 14:41:40 |
| 1162 | Perfom Physical Move | INPRG | 8/31/12 21:22:09 |

- ___ 30. Click the **Complete Activity** icon and set the status to **Completed**.
- ___ 31. Click the **Start Center** icon to return to the Inventory Administrator Start Center. There are no more tasks for the Inventory Administrator for the move request.
- ___ 32. Sign out of the console.
- ___ 33. Log in to the console as **jake** with the password **object00**.
- ___ 34. Click the **Hardware Asset Mgr** Start Center tab.

- _____ 35. Find and open the **Update IT Asset Repository** task *today's date* in the Open Activities or Tasks for Asset Mgr portlet.

| Activity | Summary | Status | Reported Date |
|----------|--|--------|------------------|
| WO1361 | Build, Image and Deliver Linux P510 Server | INPRG | 7/15/11 12:26:42 |
| WO1364 | Build, Image and Deliver X86 Win Server | INPRG | 7/15/11 12:42:13 |
| 1163 | Update IT Asset Repository | INPRG | 8/31/12 21:22:09 |

Set Graph Options 1 - 3 of 3

- _____ 36. Click **Move/Swap/Modify** under More Actions in the navigation bar.
_____ 37. Enter **NORTHERN** in the Move to Location and click **Execute Now**.

Move/Swap/Modify

Move/Swap Modify Users and Custodians Change Status

Is this an Asset Swap?

| Asset | Parent | Location | Bin | Move To Parent | Move To Location | Move To Bin |
|----------|--------|----------|-----|----------------|------------------|-------------|
| TUSC1057 | | SOUTHERN | | | NORTHERN | |

New Row

Mass Move

To Site: PMSC RTP Apply

To Location: Apply To Parent: Apply To Bin: Apply

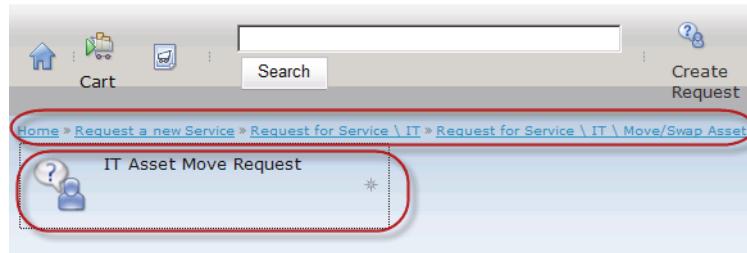
Execute Now Save As Plan Cancel

- _____ 38. Click **OK** to dismiss the system message indicating that the move was successful.
_____ 39. Click the **Complete Activity** icon and set the status to **Completed**.
_____ 40. Click **Close** to dismiss the system message indicating that the service request is resolved.
_____ 41. Click the **Start Center** icon to return to the Hardware Asset Mgr Start Center. There are no more tasks or work orders for the Hardware Asset Manager for the move request.
_____ 42. Sign out of the console.

Moving multiple assets

- _____ 43. Log in to the console as **Steve** with the password **object00**.
_____ 44. Click the **All Users** Start Center tab.

- ___ 45. Click **Self Service Center** in the Services portlet.
- ___ 46. Click **Request a new Service > Request for Service \ IT > Request for Service \ IT \ Move/Swap Asset**.
- ___ 47. Click the **IT Asset Move Request** offering.



- ___ 48. Enter **5 of the leased W510 notebooks must be moved to the Northern location for a class in two weeks** for the Details.
- ___ 49. Enter **2** for the priority.
- ___ 50. Enter **SOUTHERN** for the Current Location and **NORTHERN** for the Move to Location in the Attributes section.
- ___ 51. Enter *next Monday from today's date* in the Requested Move Date field and click **Submit Now**.

Report an Issue

IT Asset Move Request

Details:

5 of the leased W510 notebooks must be moved to the Northern location for a class in two weeks

Reported For: STEVE Priority: 2

Class Description: Request for Service \ IT \ Move/Swap Asset Phone: 713-297-4632

E-mail: steve@tivoli.edu

Attributes

| Description | Value |
|---------------------|----------|
| Current Location | SOUTHERN |
| Move to Location | NORTHERN |
| Requested Move Date | 9/3/12 |

Add to Favorites Submit Now Cancel

- ____ 52. Write down the service request number: _____.
- ____ 53. Click **OK** to dismiss the service request submitted window.
- ____ 54. Sign out of the console.
- ____ 55. Log in to the console as **jake** with the password **object00**.
- ____ 56. Click the **Hardware Asset Mgr** Start Center tab.
- ____ 57. Find and open the **Request for Service, IT, Move/Swap Asset** service request *today's date* in the Open SR for Asset Mgr portlet.



Note: You can apply a workflow like you did in the previous section. However, the main purpose of this section is to show the mass move action. Therefore, the steps are simplified.

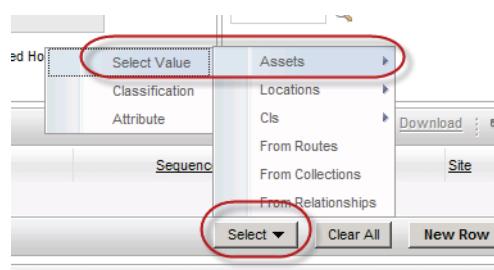
- ____ 58. Scroll to the **Service Request Details** section.

- ____ 59. Enter **PMSC RTP** for the Site.

| | |
|---|--|
| Details: 5 of the leased W510 notebooks must be moved to the Northern location for a class in two weeks | Class Description: Request for Service \ IT \ Move/Swap Asset |
| Indicated Priority: <input type="text"/> <input type="text"/> | Virtualized? <input type="checkbox"/> |
| Reported Priority: <input type="text"/> 2 <input type="button" value="🔍"/> | GL Account: <input type="text"/> <input type="button" value="🔍"/> |
| Impact: <input type="text"/> <input type="button" value="🔍"/> <input type="text"/> | Service Group: <input type="text"/> <input type="button" value="»"/> |
| Urgency: <input type="text"/> <input type="button" value="🔍"/> <input type="text"/> | Service: <input type="text"/> <input type="button" value="»"/> |
| Internal Priority: <input type="text"/> 4 <input type="text"/> Low | Vendor: <input type="text"/> <input type="button" value="»"/> |
| | Site: <input type="text"/> PMSC RTP <input type="button" value="🔍"/> |
| | SLA Applied? <input type="checkbox"/> |

- ____ 60. Scroll to the **Multiple Assets, Locations, and CIs** section.

- ____ 61. Click **Select > Assets > Select Value**.



- ___ 62. Enter Steve in the Custodian field and click **Refine**.

The screenshot shows a search interface for assets. It includes fields for Search Asset Hierarchy, Search Location Hierarchy, Status, Service Group, Service, Manufacturer, Moved?, Classification, User, GL Account, Contract, and Custodian. The Custodian field has the value "steve" entered and is circled. The Refine button at the bottom right is also circled.

- ___ 63. Select the first five W510 assets and click **OK**.

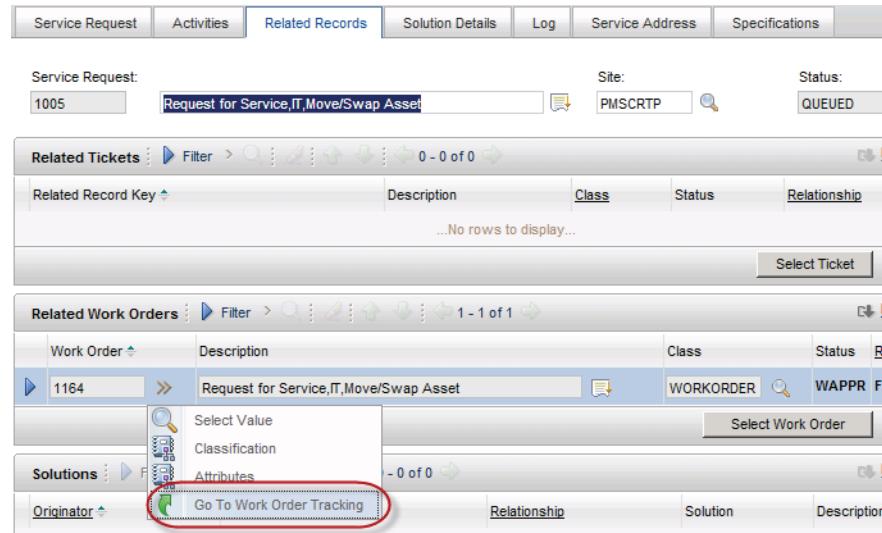
| Asset | Description | Location | Site | Rotating Item | Type |
|--|---------------------|----------|----------|---------------|------|
| TUSC1057 | Lenovo G550 Desktop | NORTHERN | PMSC RTP | | IT |
| <input checked="" type="checkbox"/> ITAM7001 | W510 notebook | SOUTHERN | PMSC RTP | W510 | IT |
| <input checked="" type="checkbox"/> ITAM7002 | W510 notebook | SOUTHERN | PMSC RTP | W510 | IT |
| <input checked="" type="checkbox"/> ITAM7003 | W510 notebook | SOUTHERN | PMSC RTP | W510 | IT |
| <input checked="" type="checkbox"/> ITAM7004 | W510 notebook | SOUTHERN | PMSC RTP | W510 | IT |
| <input checked="" type="checkbox"/> ITAM7005 | W510 notebook | SOUTHERN | PMSC RTP | W510 | IT |
| <input type="checkbox"/> ITAM7006 | W510 notebook | SOUTHERN | PMSC RTP | W510 | IT |
| <input type="checkbox"/> ITAM7007 | W510 notebook | SOUTHERN | PMSC RTP | W510 | IT |

- ___ 64. Click **Create > Create Work Order** under More Action in the navigation bar.

A message is displayed above the service request tabs indicating the work order number.

- ___ 65. Click the **Related Records** tab.

- _____ 66. Click the **Detail Menu** icon for the work order and select **Go To Work Order Tracking**.



- _____ 67. Review the work order.
_____ 68. Scroll to the Multiple Assets, Locations, and CIs section. Notice that the assets were copied to the work order.
_____ 69. Click **Move/Swap/Modify** under More Actions in the navigation bar. Notice that all of the assets are listed. The current and move to location are both SOUTHERN.
_____ 70. Enter **NORTHERN** in the To Location in the Mass Move section.

- ___ 71. Click **Apply** (next to the To Location field). Notice that the move to location for the assets is updated to NORTHERN.

The screenshot shows the 'Move/Swap/Modify' interface. At the top, there are tabs for 'Move/Swap', 'Modify', 'Users and Custodians', and 'Change Status'. Below the tabs, a question 'Is this an Asset Swap?' has a checkbox. The main area is titled 'Assets' and shows a grid of three assets: ITAM7005, ITAM7004, and ITAM7003. Each asset has columns for Asset, Parent, Location, Bin, Move To Parent, Move To Location, and Move To Bin. The 'Move To Location' column for all three assets is circled in red. Below the grid is a 'Mass Move' dialog. It includes fields for 'To Site:' (PMSCRTP), 'To Location:' (NORTHERN), and two 'Apply' buttons. The 'To Location:' field and the first 'Apply' button are also circled in red. At the bottom of the dialog are buttons for 'Execute Now', 'Save As Plan', and 'Cancel'.

- ___ 72. Click **Execute Now**.
- ___ 73. Click **Close** to dismiss the system message.
- ___ 74. Click the **Complete Work Order** icon and set the status to **Completed**.
- ___ 75. Click **Close** to dismiss the system message.
- ___ 76. Click **Return** to return to the service request.

The work order is completed and the service request is resolved. The status might not be reflected in the current record. However, if you close the record and reopen it, the status is updated.

- ___ 77. Click **Go To Applications > Assets > Assets**.
- ___ 78. Search for the **ITAM7** assets and verify that the location for the first five is **NORTHERN**.

Exercise 4-5: Swapping an asset

You can use the swap feature to replace one asset with another asset, and to specify a location for the asset you swap out. This exercise demonstrates how to swap assets.

- ___ 1. Verify that you are viewing the ITAM7 asset search. If not, click **Go To Assets > Assets** and search for the **ITAM7** assets.
- ___ 2. Open the **ITAM7001** asset. This asset is in the NORTHERN location.
- ___ 3. Click **Swap Assets** under Common Actions in the navigation bar.
- ___ 4. Enter **SOUTHERN** in the To Location to move the ITAM7001 back to the SOUTHERN location.
- ___ 5. Enter **ITAM7010** in the Replacing Asset field and click **OK**. This asset is swapped with ITAM7001 and moved to the NORTHERN location.

| Asset | Description | Parent | Location | To Location | Replacing Asset |
|----------|---------------|--------|----------|-------------|-----------------|
| ITAM7001 | W510 notebook | | NORTHERN | SOUTHERN | ITAM7010 |



Note: If the selected asset has software licenses allocated to it, you can move the allocation to the replacing asset. This process is covered in Unit 7.

- ___ 6. Click **OK** to dismiss the system message indicating that the move was successful.
- ___ 7. Click **View Record List** to return to the list of ITAM7 assets.
- ___ 8. Verify that the swap completed successfully.

ITAM7001 has a location of **SOUTHERN** and **ITAM7010** has a location of **NORTHERN**.

Exercise 4-6: Viewing asset move history

This exercise demonstrates how to view the move history of an asset.

- ___ 1. Verify that you are viewing the ITAM7 asset search. If not, click **Go To Assets > Assets** and search for the **ITAM7** assets.
- ___ 2. Open the **ITAM7001** asset.
- ___ 3. Click **View > View Asset Move History** under More Actions in the navigation bar.
- ___ 4. Click **Filter** to show the filter row.
- ___ 5. Place your cursor in the **Transaction Type** field.
- ___ 6. Press Enter to show all transaction types.

| Transaction Type | Moved Date | From Parent | From Location | From GL Account | From Site | To Parent | To Location | To GL Account | To Site |
|------------------|------------------|-------------|---------------|-----------------|-----------|-----------|-------------|---------------|----------|
| CREATED | 8/31/12 16:11:32 | | | | PMSC RTP | | SOUTHERN | | PMSC RTP |
| MOVED | 8/31/12 16:33:43 | | SOUTHERN | | PMSC RTP | | SOUTHERN | | PMSC RTP |
| MOVED | 8/31/12 21:56:17 | | SOUTHERN | | PMSC RTP | | NORTHERN | | PMSC RTP |
| MOVED | 8/31/12 21:58:32 | | NORTHERN | | PMSC RTP | | SOUTHERN | | PMSC RTP |

- ___ 7. Review the history.

It shows the creation of the asset, the initial move to SOUTHERN, and the move to NORTHERN that occurred during the swap exercise.

- ___ 8. Click **OK** to close the View Asset Move History.
- ___ 9. Sign out of the console.
- ___ 10. Tell your instructor that you are finished with the unit exercises.

Student exercises for Unit 5

This unit focuses on the management tasks performed after deployment. During the manage phase of the lifecycle, you must ensure that you can account for discrepancies between your authorized assets and your deployed assets. To make this comparison, you must use a discovery tool to verify the assets that were deployed and the configuration of those assets. The data from the discovery tool can be imported into IBM SmartCloud Control Desk by using IBM Tivoli Integration Composer. You can then run reports to compare what you authorized to what was discovered. The exercises in this unit demonstrate how to view discovered computers and compare the results to the authorized assets that you worked with in the previous units. The discovered data was imported for you. If you want to learn how to import data with IBM Tivoli Integration Composer, an optional exercise is included in Appendix A.

Exercise 5-1: Viewing discovered computers

In this exercise, you use the Computers application in the Deployed Assets module to view the discovered data that was imported. This exercise focuses on viewing deployed computer assets. Viewing software is covered in Unit 7.

- ____ 1. Log in to the console as **jake** with the password **object00**.
- ____ 2. Click **Assets > Deployed Assets > Computers** in the navigation bar.
- ____ 3. Press Enter to view a list of all discovered deployed computer assets.
- ____ 4. Review the list of deployed computer assets.

There are several types of deployed computer assets. The asset does not have to be a physical computer. It can also be a virtual machine (VM) or Logical Partition (LPAR). The Role field identifies the type of deployed computer asset. The role that is assigned can depend on the discovery tool that is used to discover the system.

- ____ 5. Find and open the **esx36-s1-flx** computer.
- ____ 6. Review the computer details.

This computer was a node discovered by Tivoli Asset Discovery for Distributed. It is a VMware ESX server with 2 processors and 12 cores.

- ____ 7. Click **Open Drilldown** under More Actions in the navigation bar.

This node hosts several virtual machines.

The screenshot shows a 'Drilldown' interface. At the top, there are fields for 'Computer:' (set to 'esx36-s1-flx') and 'Site:' (set to 'IBM_ESX36-S1-FLX.TIVOLISWGDEMO.IBM.COM'). Below these are buttons for 'Show Path to Top' and 'Cancel'. A main pane displays a hierarchical list of virtual machines under 'esx36-s1-flx:NODEHW':

- appsrv11:VM:ACTIVE (highlighted with a blue square)
- tip:VM:ACTIVE
- websrv01:VM:ACTIVE
- simtrade:VM:ACTIVE
- appsrv03:VM:ACTIVE
- tpm:VM:ACTIVE
- omnibus:VM:ACTIVE
- dhbw02:VM:ACTIVE

- ___ 8. Click the **blue square** for the **appsrv11** virtual machine to go to that computer record.

The screenshot shows the same 'Drilldown' interface as before, but with the 'appsrv11:VM:ACTIVE' entry in the list highlighted by a blue square.

- ___ 9. Review the computer details.

This virtual machine was also discovered by Tivoli Asset Discovery for Distributed. Notice that this virtual machine is linked to an actual CI. The actual CI was discovered by Tivoli Application Dependency Discovery Manager. When IBM Tivoli Integration Composer imported the data, rules were used to determine that the two tools were scanning the same computer. Therefore, the NRS/DIS GUID for the deployed asset and actual CI are the same. This match establishes the link.

- ___ 10. Click the **Software** tab.

The Filtered Application View is empty. This view is only populated if software installed on the deployed asset is marked managed in the software catalog. The purpose of the filter is to give you a view of applications that you are specifically tracking. This concept is covered in Unit 7.

- ___ 11. Click the **Applications** subtab.

The screenshot shows a software interface titled "View Record List > appsrv11". At the top, there is a navigation bar with tabs: Computer, Processors, Storage, Software (which is highlighted with a red circle), Network, Communication, Media Adapters, Displays, and Image Device. Below the navigation bar, there are fields for Computer (appsrv11) and Site (IBM ESX36-S1-FLX.TIVOLI.SWGDEMO.IBM.COM). There are also fields for Parent (esx36-s1-fx) and Role (VM). Underneath these fields is another navigation bar with tabs: Filtered Application View, Operating Systems, Suites, Files, and Applications (which is highlighted with a red circle). Below this is a table titled "Applications" showing a list of installed applications:

| Application | Manufacturer | Version |
|---|--------------|---------|
| IBM Developer Kit, JavaTM 2 Technology Edition | IBM | 1.4 |
| IBM Developer Kit, JavaTM 2 Technology Edition | IBM | 1.4 |
| IBM JavaTM Standard Edition | IBM | 6.2 |
| IBM JavaTM Standard Edition | IBM | 6.3 |
| IBM Rational Application Developer for WebSphere Software | IBM | 7.0 |
| IBM SDK 5.0 for Linux IA32, Java Technology | IBM | 5.0 |
| IBM SDK 5.0 for Linux IA32, Java Technology | IBM | 5.0 |

- ___ 12. Review the list of installed applications.

This list shows all applications discovered on the deployed asset. Scroll through the pages of applications. Some applications appear more than once because they were discovered in multiple directories on the virtual machine.

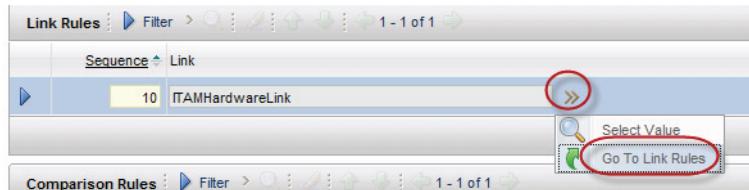
Exercise 5-2: Running reconciliation

Reconciliation can be used to find the discrepancies between your authorized assets and the deployed assets in your environment. You can use reconciliation to identify systems that were purchased, but do not have a matching deployed asset. You can also identify changes to an asset. For example, when you bought the asset, it had 6 GB of RAM. During a discovery, it is discovered that the asset now has 8 GB of RAM. Reconciliation can highlight this difference so that it can be investigated by the asset manager. Reconciliation is only used for deployed computer assets. Software discrepancies are discovered by using license audit reports. This topic is covered in Unit 7.

- ___ 1. Click **Go To Applications > Administration > Reconciliation > Reconciliation Tasks**.
- ___ 2. Find and open the **ITAMHardwareReconTask** task.
- ___ 3. Review the task.

The task is linking records in the ASSET table to records in the DEPLOYED ASSET table.

- ___ 4. Click the **Detail Menu** icon for the ITAMHardwareLink Link Rule and select **Go To Link Rules**.



- ___ 5. Review the link clauses.

There are two comparisons that the link rule is evaluating. First, it is looking for instances where SERIALNUM in the ASSET table match SERIALNUMBER in the DEPLOYED ASSET table. Second, it is looking for instances where ASSETTAG in the ASSET table match ASSETTAG in the DEPLOYED ASSET table. The sequence order for the clauses is set to OR. Therefore, if either clause is satisfied, the asset and deployed asset are linked.

The screenshot shows the 'Type of Reconciliation' interface under the 'Link Clauses' tab. It displays two link clauses:

| Sequence | Data Set 1 Attribute | Operator | Data Set 2 Attribute | Sequence Order |
|----------|----------------------|----------|----------------------|----------------|
| 10 | SERIALNUM | = | SERIALNUMBER | OR |
| 20 | ASSETTAG | = | ASSETTAG | |

- ___ 6. Click **Return**.

- ___ 7. Click the **Detail Menu** icon for the ITAMComparisonRule Comparison Rule and select **Go To Comparison Rules**.

- ___ 8. Click the **Attributes Equality** subtab.

The screenshot shows the 'Full CI Comparison' interface under the 'Attributes Equality' subtab. It displays one equality clause:

| Sequence | Data Set 1 Attribute | Operator | Data Set 2 Attribute |
|----------|----------------------|----------|----------------------|
| 10 | MACHNAME | = | NODENAME |

- ___ 9. Review the equality clause.

After a link is established between an asset and a deployed asset, the equality clause is evaluated. If a discrepancy is found between the defined attributes, the results are displayed in Asset Reconciliation Results.



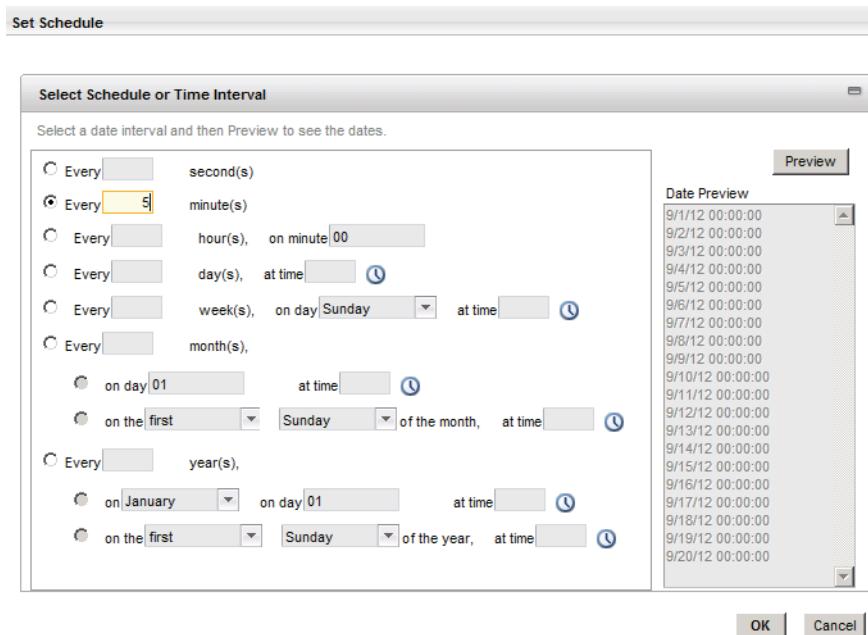
Note: You can customize the link rules to modify how assets and deployed assets are linked or compared.

___ 10. Click **Return**.

___ 11. Set the schedule to run every **5 minutes**.

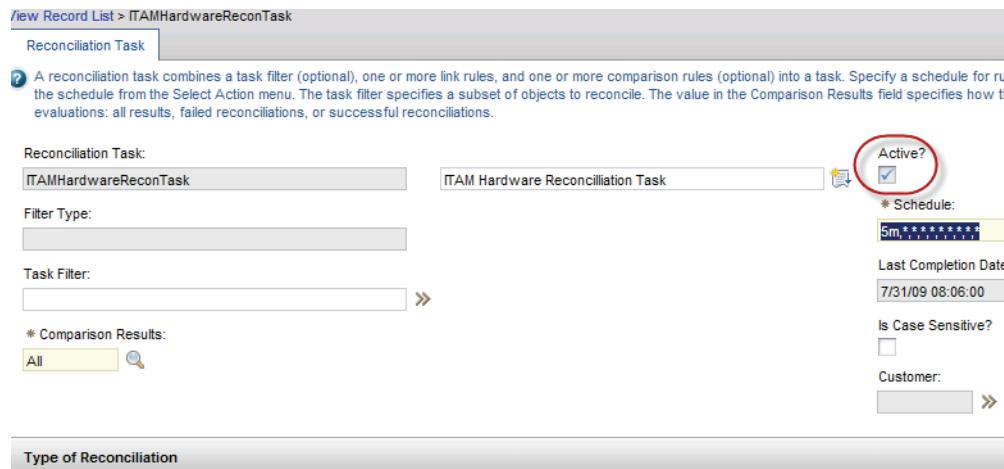


Note: To set the schedule, click the **Calendar** icon next to the schedule field. Select **Every ___ minutes(s)**, enter **5** and click **OK**.



___ 12. Click **Activate/Deactivate Reconciliation Task** under More Actions in the navigation bar.

- ___ 13. Verify that the **Active** option is selected.



- ___ 14. Click **View Record List** to return to the list of reconciliation tasks.
- ___ 15. Wait 5 minutes or more.
- ___ 16. Click the **Reload to update the list from the database** icon and verify that the Last Completion Date for the **ITAMHardwareReconTask** task is updated. If not, wait a few minutes and reload again. Repeat this step until the date is updated.

| Last Completion Date | Active |
|----------------------|-------------------------------------|
| 8/31/12 22:49:45 | <input checked="" type="checkbox"/> |

Exercise 5-3: Viewing reconciliation results

Previously, your computer was discovered and the data was imported into the database by using IBM Tivoli Integration Composer. You ran reconciliation, and the deployed assets and authorized assets were linked and compared based on rules that were set up within the reconciliation task. You can view reconciliation results in the Reconciliation module and in the IT details of an asset. This exercise demonstrates how to view the reconciliation results.

- ___ 1. Click **Go To Applications > Administration > Reconciliation > Asset Link Results**.
- ___ 2. Press **Enter** and review the list of links.
- ___ 3. Enter **esx** in the Node field.

The deployed asset, **esx36-s1-flx**, is now linked to the authorized asset record, **ITAM6005**.

| Asset Link Results | | | | | Download |
|---|------------------|------------------|----------|--------------|--------------------------|
| Site | Rule Name | Link Date | Asset | Node | |
| | | | | esx | |
| PMSCRTP | ITAMHardwareLink | 8/31/12 22:49:41 | ITAM6005 | esx36-s1-flx | |
| <input type="checkbox"/> Select Records | | | | | |

- ___ 4. Open the result record.
- ___ 5. Click the **Detail Menu** for the ITAM6005 asset and click **Go To Assets**.
- ___ 6. Click the **IT Details** tab.
- ___ 7. Scroll to the **Deployed Asset** section.

The **esx36-s1-flx** is listed, and the ITAMHardwareLink link rule was used to establish the link.

- ___ 8. Scroll to the **Reconciliation Results** section.
The attribute equality comparison failed. The authorized asset machine name does not match the deployed asset node name.

| Reconciliation Results | | | | | | | | Download |
|------------------------|---|------------------|---------------------|-----------------|-------------|---------------|--------------|--------------------------|
| Task | Result Message | Comparison Date | Reconciliation Type | Asset Attribute | Asset Value | DPA Attribute | DPA Value | |
| ITAMHardwareReconTask | Attribute equality comparison has failed. | 8/31/12 22:49:45 | ASSET | MACHNAME | | NODENAME | esx36-s1-flx | |

- ___ 9. Click **Return** to go back to the link results.
- ___ 10. Click **Go To Applications > Administration > Reconciliation > Asset Reconciliation Results**.

- ___ 11. Press Enter to retrieve a list of all results.

- ___ 12. Review the results.

There are several authorized assets that do not have a matching deployed asset.

- ___ 13. Enter **Attribute equality comparison has failed** in the Message filter and press Enter.
- ___ 14. Review the results.

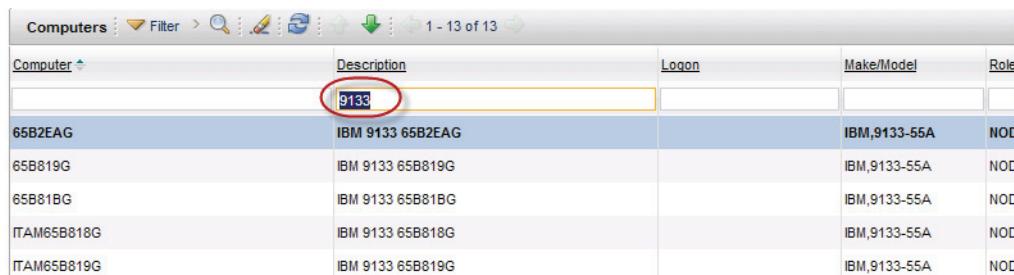
The assets listed failed to meet the comparison rules.

Exercise 5-4: Promoting a deployed asset to an authorized asset

When following the IT asset lifecycle, an authorized asset record is typically created before you deploy an asset. However, it is possible to have deployed assets that were deployed without going through the correct channels or deployed before the process was in place. When you find deployed assets that do not have a matching authorized asset record, you can use the promote to asset feature to create the authorized asset record. To manage the lifecycle of an asset, it must have an authorized asset record. This exercise demonstrates how to promote a deployed asset to an authorized asset. You can promote a single asset and its children or perform a mass promotion.

Promoting a single asset and its children

- ___ 1. Click **Go to Applications > Assets > Deployed Assets > Computers** in the navigation bar.
- ___ 2. Enter **9133** in the Description filter and press Enter.



| Computer | Description | Location | Make/Model | Role |
|-------------|------------------|----------|--------------|------|
| | 9133 | | | |
| 65B2EAG | IBM 9133 65B2EAG | | IBM,9133-55A | NOD |
| 65B819G | IBM 9133 65B819G | | IBM,9133-55A | NOD |
| 65B81BG | IBM 9133 65B81BG | | IBM,9133-55A | NOD |
| ITAM65B818G | IBM 9133 65B818G | | IBM,9133-55A | NOD |
| ITAM65B819G | IBM 9133 65B819G | | IBM,9133-55A | NOD |

- ___ 3. Open the **65B2EAG** deployed asset.
- ___ 4. Click **View Asset** under More Actions in the navigation bar.

There is no authorized asset for this deployed asset.

The screenshot shows the 'View Asset' window with the following fields:

- Node:** 65B2EAG
- IBM 9133 65B2EAG**
- Site:** [empty]
- Linked Asset:** [empty] (This field is circled in red.)
- Reconciliation Differences:** A table with columns: DPA Attribute, Value, Unit, Asset Attribute, Value, Unit, Reconciliation Message, Reconciliation Date. It displays "0 - 0 of 0".
- Buttons:** OK, Download, Filter, and other standard UI controls.

- ___ 5. Click **OK** to close the View Asset window.
 - ___ 6. Click **Open Drilldown** under More Actions in the navigation bar.
- This deployed asset has one child asset called hostname10. When you promote this asset, you can choose to promote the child asset too.

The screenshot shows the 'Drilldown' window with the following fields:

- Computer:** 65B2EAG
- Site:** [empty]
- Show Path to Top**
- Tree View:** Shows a tree structure with two items:
 - 65B2EAG:NODEHW (selected)
 - hostname10.example.com:LPAR:ACTIVE
- Buttons:** Cancel



Note: When you promote a child with a parent, the selected item is applied to the child. If the child assets require a different item, promote them separately.

- ___ 7. Click **Cancel** to close the drilldown.
- ___ 8. Click **Promote to Asset** under More Actions in the navigation bar.

Student exercises for Unit 5

Exercise 5-4: Promoting a deployed asset to an authorized asset

___ 9. Enter the following values in the Default Values section.

| Field | Value |
|--------------------------|---------------------|
| Site | PMSC RTP |
| Location | SOUTHERN |
| Status | OPERATING |
| Item | ITAM9133 |
| Promote Child Partitions | [<i>Selected</i>] |

10. Click **Apply Defaults**.

Promote to Assets

Create authorized asset records associated by entering details and pressing OK. Records must be selected on the list tab to appear in the dialog.

| Computers Selected for Promotion | | | | | | Download | Print |
|----------------------------------|------------------|--------------|-------------|-------------|--------------------------|--------------------------|-----------------------|
| Node | Description | Parent Asset | Location | Item | Partition? | | |
| 65B2EAG | IBM 9133 65B2EAG | | SOUTHERN >> | ITAM9133 >> | <input type="checkbox"/> | | |

Default Values

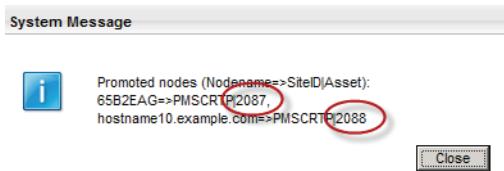
Site must be entered below. Other values below will be applied only when values are not entered for each row above.

| | | |
|---|---|-----------------------|
| * Site: | Item: | |
| PMSCRTP  | ITAM9133 >> | |
| Customer: | Classification: | |
| <input type="text"/> >> | IT \ COMPUTER SYSTEM >> | |
| Location: | Class Description: | |
| SOUTHERN >> | IT \ Computer Systems | |
| Status: | | |
| OPERATING  | | |
| Promote Partitions? | | |
| <input checked="" type="checkbox"/> | Apply Defaults  | Clear Defaults |
| | OK | Cancel |

11. Click **OK** to promote the asset.

12. Review the system message.

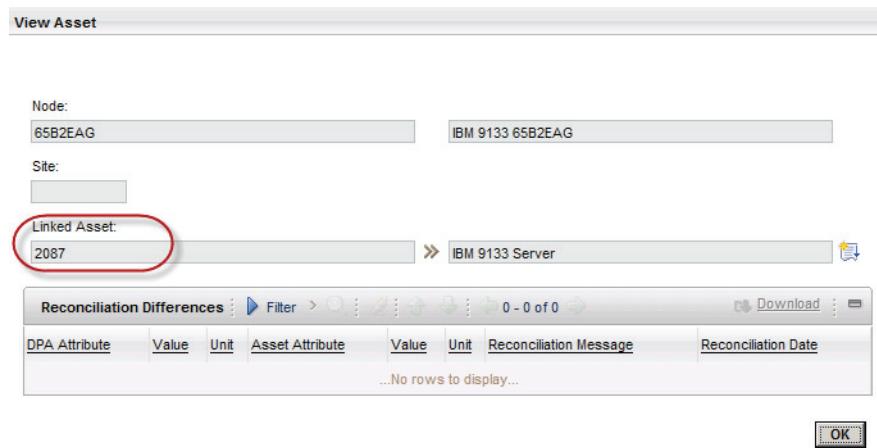
It indicates that two nodes were promoted. The last number on each line is the asset number.



___ 13. Click **Close** to dismiss the system message.

___ 14. Click **View Asset**.

The deployed asset is now linked to an authorized asset.



___ 15. Click **OK** to close the View Asset window.

Promoting multiple assets

___ 16. Click **View Record List**.

___ 17. Click the **Reload to update the list from the database** icon to refresh the list.

___ 18. Select the **Select Records** option below the list.

- ___ 19. Select all of the records.

| Computer | Description | Logon |
|--|------------------|-------|
| 65B2EAG | IBM 9133 65B2EAG | |
| 65B819G | IBM 9133 65B819G | |
| 65B81BG | IBM 9133 65B81BG | |
| ITAM65B818G | IBM 9133 65B818G | |
| ITAM65B819G | IBM 9133 65B819G | |
| ITAM65B81AG | IBM 9133 65B81AG | |
| ITAMNC047041 | IBM 9133 65B819G | |
| ITAMNC047109 | IBM 9133 65B81AG | |
| ITAMnc047165 | IBM 9133 65B819G | |
| hostname10.example.com | IBM 9133 65B2EAG | |
| hostname30.example.com | IBM 9133 65B819G | |
| hostname32.example.com | IBM 9133 65B81BG | |
| hostname34.example.com | IBM 9133 65B819G | |
| <input checked="" type="checkbox"/> Select Records | | |

- ___ 20. Click **Promote to Asset** under More Actions in the navigation bar.

- ___ 21. Enter the following values in the Default Values section.

| Field | Value |
|--------------------------|------------------|
| Site | PMSC RTP |
| Location | SOUTHERN |
| Status | OPERATING |
| Item | ITAM9133 |
| Promote Child Partitions | [Selected] |

22. Click **Apply Defaults**.

| Promote to Assets | | | | | | | |
|------------------------|------------------|----------|----------|---|----------|-------------------------------------|-------------------------------------|
| 65B819G | IBM 9133 65B819G | | SOUTHERN | » | ITAM9133 | » | <input type="checkbox"/> |
| 65B81BG | IBM 9133 65B81BG | | SOUTHERN | » | ITAM9133 | » | <input type="checkbox"/> |
| hostname10.example.com | IBM 9133 65B2EAG | 2087 | SOUTHERN | » | » | <input checked="" type="checkbox"/> | |
| hostname30.example.com | IBM 9133 65B819G | | SOUTHERN | » | ITAM9133 | » | <input checked="" type="checkbox"/> |
| hostname32.example.com | IBM 9133 65B81BG | ITAM4008 | SOUTHERN | » | ITAM9133 | » | <input checked="" type="checkbox"/> |
| hostname34.example.com | IBM 9133 65B819G | | SOUTHERN | » | ITAM9133 | » | <input checked="" type="checkbox"/> |

Default Values

Site must be entered below. Other values below will be applied only when values are not entered for each row above.

* Site: PMSCRTP

Customer:

Location: SOUTHERN

Status: OPERATING

Promote Partitions?

Item: ITAM9133

Classification: IT \ COMPUTER SYSTEM

Class Description: IT \ Computer Systems

23. Click **OK** to promote the assets.

24. Review the system message.

It indicates that several nodes were promoted and a few of the selected nodes were previously promoted or linked.

25. Click **Close** to dismiss the system message.

26. Clear the **Select Records** option.

27. Open any record other than **65B2EAG**.

28. Click **View Asset** under More Actions in the navigation bar.

The Linked Asset field shows the promoted asset number for the deployed asset.

29. Click **OK** to close the View Asset window.

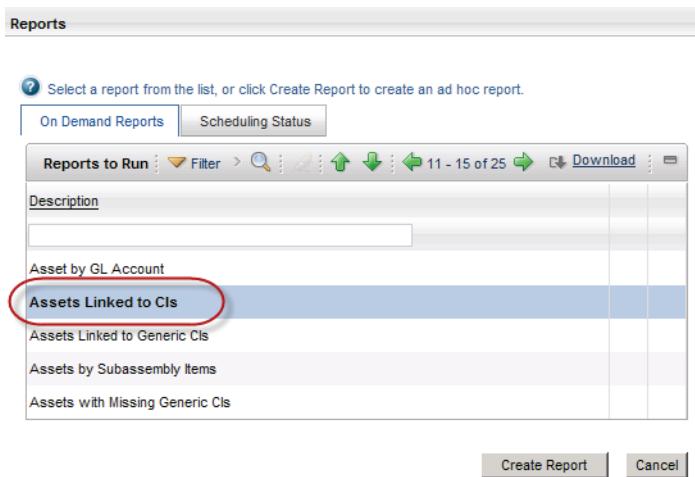
Exercise 5-5: Linking assets and Cls

IBM SmartCloud Control Desk includes configuration management features. Configuration management differs from IT asset management in that it is managing the operational aspects of assets. IT asset management is primarily focused on the financial aspect of assets.

Configuration management is primarily focused on the integrity of the configuration of items to ensure that changes in the environment do not affect the delivery of service. Configuration management focuses on relationships. By understanding the relationships, you can efficiently manage changes. For example, you might know that a critical web application uses a specific database server. You know that changes to the database might affect that critical application.

Although these disciplines have different focuses, they are often referring to the same asset. Understanding this relationship is key. It is important to know where an asset is in the financial lifecycle when managing it operationally. If you know that an asset is near retirement, that can affect the changes that you make on it from an operational perspective. When using IBM SmartCloud Control Desk for IT asset management and configuration management, you can link these asset records (assets and configuration items) to create a connected representation of the IT resource. This exercise demonstrates how to link asset and CIs.

- ___ 1. Click **Go To Applications > Assets > Assets** in the navigation bar.
- ___ 2. Click **Run Reports** under More Actions in the navigation bar.
- ___ 3. Find and click the **Assets Linked to CIs** report.



- ___ 4. Click **Submit** to run the report.
- ___ 5. If you receive a **Pop-up blocked** message, select to always allow pop-ups from this site and resubmit the report.



- ___ 6. Review the report.

It opens in a new Internet Explorer window. A few assets and CIs are already linked in the demonstration data.

- ___ 7. Close the report.
 - ___ 8. Click **Cancel** to dismiss the report list.
 - ___ 9. Click **Go To Applications > Administration > Reconciliation > Reconciliation Tasks** in the navigation bar.
 - ___ 10. Press Enter to view a list of reconciliation tasks.
 - ___ 11. Open the **CCILinkAssetsAndCIs** reconciliation task.
 - ___ 12. Review the task.

The task is linking records in the CI table to records in the ASSET table.
 - ___ 13. Click the **Detail Menu** icon for the CCIAssetCISerialNum Link Rule and select **Go To Link Rules**.
 - 14. Review the link clauses.

There are 11 comparisons that the link rule is evaluating. Each clause is comparing COMPUTERSYSTEM_SERIALNUMBER to SERIALNUM. This difference in each clause is the class structure. The class structure varies by operating system, which is why there are so many clauses. In addition to comparing serial numbers, the process also looks for assets and CIs that have matching NRS/DIS GUIDs. This matching can be extended to linked relationships. For example, an authorized asset to authorized CI link occurs when the following three conditions exist:

- An authorized asset is linked to a deployed asset
 - The deployed asset is linked to an actual CI by matching NRS/DIS GUIDs
 - The actual CI is linked to an authorized configuration item

View Record List > CCIAssetCISerialNum

Link Rule

?

A link rule identifies the attributes used to associate, or link, a top-level object in Data Set 1 and an object in Data Set 2 when a reconciliation task is executed. If multiple links, enter a sequence number to specify the order in which to apply each rule. The system processes link rules in a cascading sequence, beginning at the end of the cascading rule list.

Link:

| | | |
|---------------------|--|-----------|
| CCIAssetCISerialNum | Matches asset serial numbers with CI serial numbers. | Customer: |
|---------------------|--|-----------|

Type of Reconciliation

Data Set 1: will be linked to Data Set 2:

| | |
|----|-------|
| CI | ASSET |
|----|-------|

Link Clauses | Filter > 1 - 11 of 11

| Sequence | Data Set 1 Attribute | Operator | Data Set 2 Attribute |
|----------|-----------------------------|----------|----------------------|
| 10 | COMPUTERSYSTEM_SERIALNUMBER | = | SERIALNUM |
| 20 | COMPUTERSYSTEM_SERIALNUMBER | = | SERIALNUM |
| 30 | COMPUTERSYSTEM_SERIALNUMBER | = | SERIALNUM |
| 40 | COMPUTERSYSTEM_SERIALNUMBER | = | SERIALNUM |
| 50 | COMPUTERSYSTEM_SERIALNUMBER | = | SERIALNUM |
| 60 | COMPUTERSYSTEM_SERIALNUMBER | = | SERIALNUM |
| 70 | COMPUTERSYSTEM_SERIALNUMBER | = | SERIALNUM |

- ___ 15. Click **Return**.



Note: If you completed the IBM SmartCloud Control Desk 7.5 Foundations course on the class image, the **CCILinkAssetsAndCIs** cron task might already be enabled. If so, skip to Step 18. New assets are linked based on the exercises that you completed in this course.

- ___ 16. Set the schedule to every **5 minutes**.
- ___ 17. Click **Activate/Deactivate Reconciliation Task** under More Actions in the navigation bar.
- ___ 18. Wait **5** minutes or more for the task to run.
- ___ 19. Click **View Record List**.
- ___ 20. Click the **Reload to update the list from the database** icon and verify that the Last Completion Date for the **CCILinkAssetsAndCIs** task is updated. If not, wait a few minutes and reload again. Repeat this step until the date is updated.
- ___ 21. Click **Go To Applications > Assets > Assets** in the navigation bar.
- ___ 22. Click **Run Reports** under More Actions in the navigation bar.
- ___ 23. Find and click the **Assets Linked to CIs** report.
- ___ 24. Click **Submit** to run the report.
- ___ 25. Review the report. Notice that there are new linked assets and CIs.
- ___ 26. Close the report.
- ___ 27. Click **Cancel** to dismiss the report list.
- ___ 28. Find and open the **ITAM6001** asset. This asset is a newly linked asset.
- ___ 29. Click the **IT Details** tab. Notice that the **Configuration Item** is populated.

The screenshot shows the 'View Record List > ITAM6001' interface. The 'IT Details' tab is active. The 'Asset' field contains 'ITAM6001'. The 'Status' field is set to 'ACTIVE'. The 'Site' field is 'PMSCRTP'. The 'Location' field has a '»' button. The 'Configuration Item' section is highlighted with a red box, showing 'DMGR.EU.TIDE.IBM.COM~20008' in the dropdown and 'DMGR.EU.TIDE.IBM.COM' in the 'Configuration Item Name' field. The 'Details' button is at the bottom.

- ___ 30. Sign out of the console.

_____ 31. Tell your instructor that you are finished with the unit exercises.

Student exercises for Unit 6

This unit focuses on the disposal process for assets. You can use the disposal process to track when assets leave the organization. Before you dispose of an IT asset, you must ensure that any company data is removed. You can use work orders to ensure that company policies are followed. If you want to learn how to use the Integration Framework to export disposal information, an optional exercise is in Appendix A.

Exercise 6-1: Creating a location for returned leased assets

In this exercise, you create a virtual location to which all assets that are coming to the end of their lease can be moved.

- ____ 1. Log in to the console as **jake** with the password **object00**.
- ____ 2. Click **Assets > Locations** in the navigation bar.
- ____ 3. Click the **New Location** icon.

- ___ 4. Create a location with the following data.

| Field | Value |
|-------------|--|
| Location | RETURNEDLEASE |
| Description | Assets returned to vendor after end of lease |
| Type | VENDOR |

- ___ 5. Click the **Save Location** icon.

- ___ 6. Sign out of the console.

Exercise 6-2: Requesting an asset disposal

This exercise shows you how to process the asset lease return by creating a service request. The Assets application is then used to move and decommission the assets.

- ___ 1. Log in to the console as **Steve** with the password **object00**.
- ___ 2. Click the **All Users** Start Center tab.

- ___ 3. Click **IT Asset Disposal Request** in the Quick Insert portlet.
- ___ 4. Enter **3** for the priority.
- ___ 5. Enter **ITAM7010** for the affected asset.
- ___ 6. Enter **Finished with this leased asset. It can be returned to the vendor** for the Details.
- ___ 7. Enter *2 days from today* for the Requested Move Date.

The screenshot shows the 'Affected Asset Details' section with fields for E-mail (steve@tivoli.edu), Reported Date (8/31/12 19:56:58), and a 'Screen Capturer' button. Below it is the 'Request Description' section with a summary field containing 'Request for Service,IT,Asset Disposal' and a rich text editor. The editor's status bar shows 'Font' and 'Size' dropdowns, and a toolbar with various icons. A message 'Finished wth this leased asset. It can be returned to the vendor' is entered into the rich text area.

- ___ 8. Click **Submit**.
- ___ 9. Write down the service request number: _____ .

The screenshot shows a confirmation message: 'Service Request 1006 has been submitted. Record your Service Request for future reference.' Below the message are three buttons: 'View Details', 'Return to Start Center', and 'Create Another Service Request'.

- ___ 10. Click **Return to Start Center** to dismiss the system message.
- ___ 11. Sign out of the console.

Exercise 6-3: Processing the asset disposal request

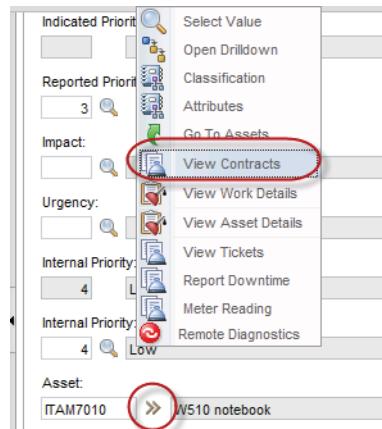
When you are retiring an asset, it is important to remove any company data before disposal. You can use work orders to ensure that a standard process is followed. This exercise demonstrates the steps to process an asset disposal.

- ___ 1. Log in to the console as **jake** with the password **object00**.
- ___ 2. Click the **Hardware Asset Mgr** Start Center tab.
- ___ 3. Open the **Request for Service, IT, Asset Disposal** service request with *today's date* in the Open SR for Asset Mgr portlet.

| Open SR for Asset Mgr | | Filter | Search | Print | Close |
|-----------------------|---------------------------------------|--------|-------------------|-------|-------|
| Service Request | Summary | Status | Reported Date | | |
| SR1092 | IT Asset Move Request | INPROG | 4/21/11 14:00:14 | | |
| SR1160 | Asset Disposal Request | INPROG | 5/19/11 09:16:53 | | |
| TUSC1070 | Update Asset to New Owner | QUEUED | 12/23/11 13:29:51 | | |
| TUSC1072 | Asset update | QUEUED | 12/23/11 14:05:02 | | |
| TUSC1074 | New Location for Asset | QUEUED | 12/23/11 14:06:57 | | |
| TUSC1076 | Asset Update New Group | QUEUED | 12/23/11 14:07:47 | | |
| TUSC1078 | Asset status Update | QUEUED | 12/23/11 14:09:25 | | |
| TUSC1080 | Not Primary user | QUEUED | 12/23/11 14:11:03 | | |
| 1006 | Request for Service,IT,Asset Disposal | QUEUED | 9/1/12 00:56:58 | | |

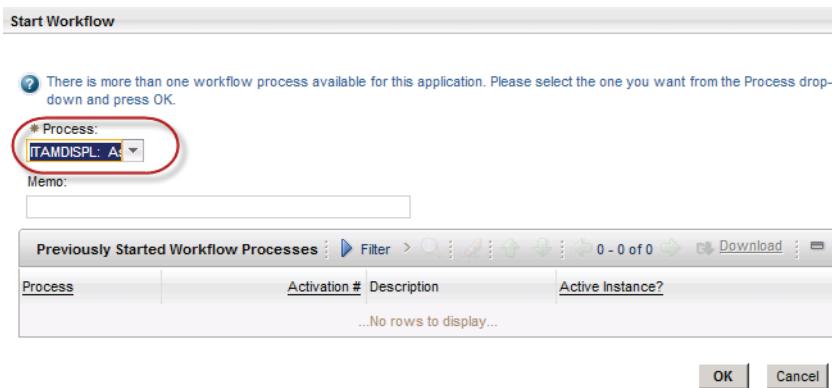
- ___ 4. Scroll to the **Service Request Details** section.
- ___ 5. Click the **Details Menu** icon for the Asset and click **View Contracts**.

The contracts indicate that this asset is part of the COMPWLD notebook lease contract.



- ___ 6. Click **OK** to dismiss the View Contracts window.
- ___ 7. Enter **COMPWLD** for the Vendor.

- ____ 8. Click the **Route Workflow** icon.
____ 9. Select the **ITAMDISPL** Process and click **OK**.



- ____ 10. Select **Create Asset Disposal WO** for this Request and click **OK**.
____ 11. Review the work order and write down the work order number: _____.
____ 12. Click the **Plans** tab and review the plans.
____ 13. Click the **Initiate Work Order** icon and set the status to **In Progress**.
The first task in the plan is to remove software from the asset that is assigned to the Inventory Administrator.
____ 14. Sign out of the console.

Exercise 6-4: Performing the disposal tasks

This exercise demonstrates how to complete the disposal tasks.

- ____ 1. Log in to the console as **elmo** with the password **object00**.
____ 2. Click the **Inventory Administrator** Start Center tab.
____ 3. Open the **Remove / Reassign Software from Asset** task with *today's date* in the Open Tasks for Inventory Admin portlet.

| Open Tasks for Inventory Admin | | | |
|--------------------------------|--|--------|-------------------|
| Activity | Summary | Status | Reported Date |
| WO1370 | Issue Std Desktop from Inventory to Work Order | INPRG | 7/19/11 10:34:39 |
| WO1373 | Issue Std Laptop from Inventory to Work Order | INPRG | 7/19/11 10:46:12 |
| WO1427 | Issue Cisco 6500 from Inventory to Work Order | INPRG | 8/10/11 13:57:05 |
| TUSC1195 | Issue Asset from Inventory to Work Order | APPR | 12/23/11 14:41:40 |
| 1166 | Remove / Reassign Software from Asset | INPRG | 9/1/12 01:18:58 |

- ___ 4. Review the details.
- ___ 5. Click the **Detail Menu** for the **Asset** field and click **Go To Assets**.
- ___ 6. Click the **IT Details** tab.
- ___ 7. Verify that there are no licenses allocated to this asset.



| Software Products | | | | | | | |
|--------------------------|-------------|---------|--------------|----------|---------------|----------|------|
| Software Name | Version | Release | License Name | Role | Platform | Deleted? | Manu |
| ...No rows to display... | | | | | | | |
| Software Licenses | | | | | | | |
| License Name | Description | Type | Status | Capacity | Capacity Unit | | |
| ...No rows to display... | | | | | | | |

Note: If there are licenses allocated, you click **Manage Software License Allocations** under More Actions in the navigation bar. You see a list of licenses. Select the licenses and click **Remove**. This feature is covered in Unit 7.

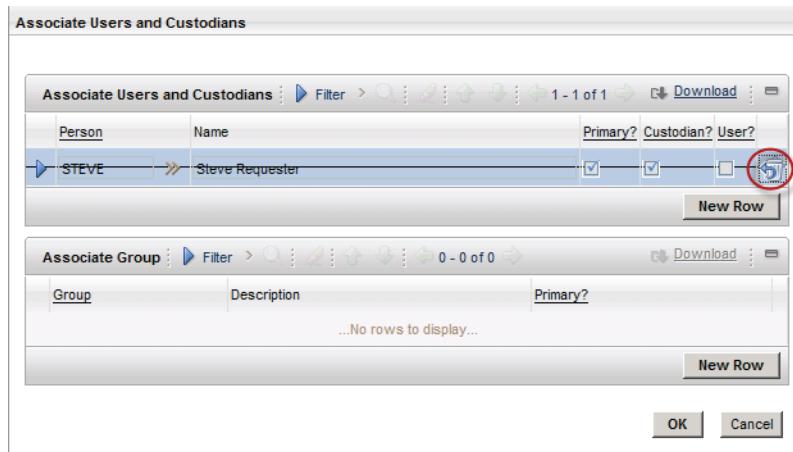
- ___ 8. Click **Return**.
- ___ 9. Click the **Complete Activity** icon and set the status to **Completed**.
- ___ 10. Sign out of the console.
- ___ 11. Log in to the console as **jake** with the password **object00**.
- ___ 12. Click the **Hardware Asset Mgr** Start Center tab.
- ___ 13. Open the **Prepare Hardware for Disposal** task in the Open Activities or Tasks for Asset Mgr portlet.

| Open Activities or Tasks for Asset Mgr | | | | |
|--|--|--------|------------------|------------|
| Activity | Summary | Status | Reported Date | |
| W01361 | Build, Image and Deliver Linux P510 Server | INPRG | 7/15/11 12:26:42 | |
| W01364 | Build, Image and Deliver X86 Win Server | INPRG | 7/15/11 12:42:13 | |
| 1167 | Prepare Hardware for Disposal | INPRG | 9/1/12 01:18:58 | |
| Set Graph Options | | | | 1 - 3 of 3 |

In this step, Jake clears the notebooks of all data and removes the asset tag. He also removes Steve as a user of the asset.

- ___ 14. Click the **Detail Menu** for the **Asset** field and click **Go To Assets**.

- ___ 15. Click **Associate Users and Custodians** under Common Actions in the navigation bar.
- ___ 16. Click the **Delete** icon next to Steve and click **OK** to remove Steve as a custodian of the asset.



- ___ 17. Click **Return**.
- ___ 18. Click the **Complete Activity** icon and set the status to **Completed**.
- ___ 19. Click the **Start Center** icon to return to the Hardware Asset Mgr Start Center.
- ___ 20. Open the **Update Asset Record(s) with Disposal Details** task in the Open Activities or Tasks for Asset Mgr portlet.
- ___ 21. Click the **Detail Menu** for the **Asset** field and click **Go To Assets**.
- ___ 22. Click the **IT Details** tab.

- ___ 23. Enter the following information in the **End of Life** section.

| Field | Value |
|------------------|---------------------|
| Type of Disposal | Returned |
| Date of Disposal | Today's date |
| Recipient | Clerk |
| Price/Value | 1100 |

The screenshot shows the 'End of Life' dialog box with the following fields populated:

- Type of Disposal: Returned
- Date Disposed: 9/1/12
- Recipient: CLERK
- Charge: 0.00
- Price/Value: 1,100.00
- Disposal Request ID: (empty)
- Disposal Remarks: (empty)

- ___ 24. Click the **Change Status** icon and set the status to **Disposed**.

- ___ 25. Click **Return**.

- ___ 26. Click **Move/Swap/Modify** under More Actions in the navigation bar.

- _____ 27. Enter **RETURNEDLEASE** in the Move To Location and click **Execute Now**.

The screenshot shows the 'Move/Swap/Modify' screen. At the top, there are tabs: 'Move/Swap' (which is selected), 'Modify', 'Users and Custodians', and 'Change Status'. Below the tabs, there is a question 'Is this an Asset Swap?' with a checkbox. The main area is titled 'Assets' and shows a table with one row. The columns are: Asset (ITAM7010), Parent, Location (NORTHERN), Bin, Move To Parent, Move To Location (which has a red circle around it and contains 'RETURNEDLEA'), and Move To Bin. At the bottom of the screen, there is a 'Mass Move' section with fields for 'To Site' (PMSCRTP) and 'To Location' (with a red circle around the 'Apply' button). On the right side of the 'Mass Move' section, there are 'To Parent' and 'To Bin' fields with their own 'Apply' buttons. At the very bottom, there are three buttons: 'Execute Now' (which has a red circle around it), 'Save As Plan', and 'Cancel'.

- _____ 28. Click **OK** to close the system message.
- _____ 29. Click the **Complete Activity** icon and set the status to **Completed**.
- _____ 30. Click **Close** to dismiss the system message.
- _____ 31. Sign out of the console.
- _____ 32. Log in to the console as **steve** with the password **object00**.
- _____ 33. Click the **All Users** Start Center tab.
- _____ 34. Click **Self Service Center** in the Service portlet.
- _____ 35. Click **Show All My Assets** in the My Assets pod.
- _____ 36. Verify that the **ITAM7010** asset is no longer listed.
- _____ 37. Close **My Assets**.
- _____ 38. Sign out of the console.
- _____ 39. Tell your instructor that you are finished with the unit exercises.

Student exercises for Unit 7

Exercise 7-1: Viewing software catalog entries

During the lecture, you learned that the software catalog is a repository of software products, components, and hierarchy. The software catalog is populated in three ways:

- Direct import of the published IBM software catalog
- Import of a published Software Knowledge Toolkit software catalog
- Import of discovery tool data



Note: The software catalog was populated on the class image. If you want to learn how to import the software catalog, an optional exercise is in Appendix A.

The software catalog is the link between authorized software (licenses) and discovered software (imported with IBM Tivoli Integration Composer). The software product names are used to link software licenses to deployed software when running license audit reports. Therefore, it is important to select the correct software name when creating software items and licenses. This exercise demonstrates how to search for software in the software catalog so that you can select the appropriate software name.

- ____ 1. Log in to the console as **ling** with the password **object00**. Ling is a software asset manager.
- ____ 2. Click **Administration > Deployed Assets > Software Catalog** in the navigation bar.
- ____ 3. Press Enter to view a list of all software catalog entries.

There are approximately 103,000 entries. The IBM Software Catalog was preloaded on the classroom image, and discovery data was imported.

| Software Name | Version | Release | Role | Platform | Managed As | Revi |
|--|---------|---------|-----------------|-------------|------------|-------------------------------------|
| IBM PE Runtime Edition for Linux on x86 Architecture | | | SOFTWAREPRODUCT | DISTRIBUTED | | <input checked="" type="checkbox"/> |
| LoadL | | | COMPONENT | DISTRIBUTED | | <input checked="" type="checkbox"/> |
| IBM Virtual I/O Server | | | COMPONENT | DISTRIBUTED | | <input checked="" type="checkbox"/> |
| VMControl Express | | | COMPONENT | DISTRIBUTED | | <input checked="" type="checkbox"/> |
| IBM Systems Director Active Energy Manager | | | COMPONENT | DISTRIBUTED | | <input checked="" type="checkbox"/> |
| IBM Systems Director VMControl | | | SOFTWAREPRODUCT | DISTRIBUTED | | <input checked="" type="checkbox"/> |
| IBM Systems Director Network Control | | | COMPONENT | DISTRIBUTED | | <input checked="" type="checkbox"/> |
| IBM Systems Director Network Control | | | SOFTWAREPRODUCT | DISTRIBUTED | | <input checked="" type="checkbox"/> |
| IBM LoadLeveler for Linux on x86 Architecture | | | SOFTWAREPRODUCT | DISTRIBUTED | | <input checked="" type="checkbox"/> |

- ___ 4. Review the list of entries. Notice the different Roles.

The software catalog contains software products and components. A third role called feature is also available. However, the current catalog does not contain any entries with the feature role.

- ___ 5. Enter =N in the Reviewed filter field and press Enter.

This filter returns a list of all software entries that are not confirmed.

All the software entries listed were added to the software catalog during the import of data from a discovery tool data other than IBM Tivoli Asset Discovery for Distributed or Tivoli Asset Discovery for z/OS. All software entries added by the import of the IBM software catalog or Software Knowledge Base Toolkit are automatically marked as reviewed. When selecting a software product for items and licenses, you want to ensure that it is reviewed and is an accurate entry.



Note: Software catalog records that are imported from Software Knowledge Base Toolkit have the Reviewed flag set to Y by default, and that setting cannot be cleared. In this case, any reviews for consistency must be done from the knowledge base before exporting the data. The same is true for software catalog records that are imported from IBM Tivoli Asset Discovery for z/OS.

- ___ 6. Clear the **Reviewed** filter.

- ___ 7. Enter **IBM WebSphere Portal Server** in the Software Name filter and press Enter.

This filter returns a list of all software entries with IBM WebSphere Portal Server in the name. The list includes the top-level product, components, versions, and releases. The entries were created when the IBM software catalog was imported. When creating a license, you typically select the top-level product. The **top-level product** is the software name with the role **SOFTWAREPRODUCT** and no version or release defined.

- _____ 8. Click **Advanced Search**.
- _____ 9. Click **Restore Application Defaults** to clear the filters.
- _____ 10. Expand the **Product Part Numbers** section.
- _____ 11. Enter **D59FLLL** in the Part Number field and click **Find**.
- _____ 12. Review the list of software items returned. You can use the part number search to find software products that you bought from IBM. Part numbers must be included in the software catalog when it is imported (directly or from Software Knowledge Base Toolkit). The part number, **D59FLLL**, is used for several versions of IBM WebSphere Portal Server.
- _____ 13. Open the first record for **IBM WebSphere Portal Server release 6.0**.
- _____ 14. Review the details of the software.
- _____ 15. Click the **Product Hierarchy** tab.
- _____ 16. Scroll to the **Higher Level Software** section.
- _____ 17. Click the **Detail Menu** for the Software Name field and click **Go To Software Catalog**.
- _____ 18. Review the details of the software.

This entry, **IBM WebSphere Portal Server version 6**, is the parent of the previous entry. A software hierarchy is defined in the IBM software catalog to maintain parent and child relationships between products, versions, releases, and variants.
- _____ 19. Click the **Product Hierarchy** tab.
- _____ 20. Scroll to the **Related Releases/Features** section. Notice all of the releases in the list. These releases are children to the IBM WebSphere Portal Server version 6 that you are viewing.

| Software Name | Version | Release | Role | Type |
|-----------------------------|---------|---------|-----------------|---------|
| IBM WebSphere Portal Server | 6 | 6.0 | SOFTWAREPRODUCT | RELEASE |
| IBM WebSphere Portal Server | 6 | 6.1 | SOFTWAREPRODUCT | RELEASE |
| IBM WebSphere Portal Server | 6 | 6.0 | SOFTWAREPRODUCT | RELEASE |

- _____ 21. Scroll to the **Higher Level Software** section.
- _____ 22. Click the **Detail Menu** for the Software Name field and click **Go To Software Catalog**.
- _____ 23. Review the details of the software. Notice there is no version or release defined and the role is **SOFTWAREPRODUCT**. This entry is the top-level product for IBM WebSphere Portal Server.

- ___ 24. Click the **Product Hierarchy** tab.
- ___ 25. Scroll to the **Related Versions** section. Notice all of the versions in the list. These versions are children to the top-level IBM WebSphere Portal Server product.

| Software Name | Version | Release | Role | Type |
|-----------------------------|---------|---------|-----------------|---------|
| WebSphere Portal Server | 6 | | SOFTWAREPRODUCT | VERSION |
| IBM WebSphere Portal Server | 5 | | SOFTWAREPRODUCT | VERSION |
| IBM WebSphere Portal Server | 6 | | SOFTWAREPRODUCT | VERSION |
| IBM WebSphere Portal Server | 4 | | SOFTWAREPRODUCT | VERSION |
| IBM WebSphere Portal Server | 7 | | SOFTWAREPRODUCT | VERSION |

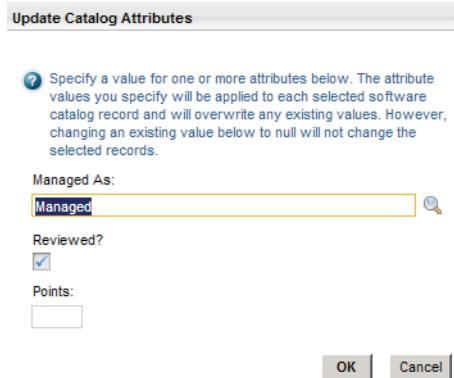
- ___ 26. Click **Return** until you are back to the first IBM WebSphere Portal Server software entry in the Software Catalog.
- ___ 27. Click **View Record List** to return to the list of IBM WebSphere Portal servers related to the part number **D59FLLL**.

Exercise 7-2: Defining software as managed

For reporting purposes, you can flag software that you want to manage in the software catalog. When you perform this step, managed applications are displayed in the filtered application list of deployed assets. You can also use this field to perform searches and create custom reports. This exercise demonstrates how to flag software as managed.

- ___ 1. Click **Advanced Search**.
- ___ 2. Click **Restore Application Defaults**.
- ___ 3. Enter =**Adobe Acrobat** for the Software Name and click **Find**.
- ___ 4. Select the **Select Records** option.
- ___ 5. Select all of the records in the view.
- ___ 6. Click **Update Catalog Attributes** under More Actions in the navigation bar.
- ___ 7. Enter **Managed** for the Managed As attribute and click **OK**.

All versions and releases of Adobe Acrobat are now marked as managed.



- ___ 8. Click **OK** to dismiss the system message.
- ___ 9. Click **Go To Applications > Assets > Deployed Assets > Deployed Software**.
- ___ 10. Click **Advanced Search**.
- ___ 11. Enter =**Managed** in the Managed As field and click **Find**.

All instances of Adobe Acrobat are displayed. If you mark other software products as managed, the installed instances of those software products are also listed.
- ___ 12. Click **Go To Applications > Assets > Deployed Assets > Computers**.
- ___ 13. Click **Advanced Search**.
- ___ 14. Expand the **Applications** section.
- ___ 15. Enter =**Managed** in the Managed As field and click **Find**.

All computers with Adobe Acrobat installed are displayed. If you mark other software as managed, the computers with those software products installed are also in the list.
- ___ 16. Open the **Mobile02** computer.
- ___ 17. Click the **Software** tab. Notice that Adobe Acrobat is displayed in the filtered application list. Only software installed on this computer that also has the Managed As field defined in the Software Catalog, appears in this list. The Applications subtab shows all software

installed. When you use the Managed As field, you can focus on only the software products that you care about.

The screenshot shows a software catalog entry for a computer named "Mobile02". The "Software" tab is selected. The table below shows the details of the application:

| Application | Manufacturer | Version |
|---------------|--------------|---------|
| Adobe Acrobat | Adobe | 8.0 |

Exercise 7-3: Creating a software item

This exercise demonstrates how to create a software item. You are shown two methods. The first method initiates the creation of the software item from the software catalog. When combined with the previous steps, this method is a good way to ensure that you are using the correct software entry. The second method initiates the creation of the software item from the Item Master application.

Creating a software item from the software catalog

- ___ 1. Click **Go To Applications > Administration > Deployed Assets > Software Catalog** in the navigation bar.
- ___ 2. Find and open the top-level **IBM WebSphere Portal Server** software catalog entry. If you are not sure how to find the top-level product, use the steps in Exercise 7-1, “Viewing software catalog entries” on page 7-1 to help you.
- ___ 3. Click **Create Item Master** under More Actions in the navigation bar.

- ___ 4. Click the **View Details** icon to expand the new item in the Create Item Master window.
- ___ 5. Enter the following information to define the software item.

| Field | Value |
|----------------|--|
| Item | IBMWASPS |
| Description | <i>[Leave blank for now]</i> |
| Classification | IT \ SOFTWARE \ BUSINESS APPLICATION SOFTWARE |
| Vendor | IBM |

Create Item Master

? You must specify a value for Item. Values that you specify in the Details section apply to the open catalog record only. Values that you specify in the Default Values section apply to all selected catalog records.

| Items | Software Name | Version | Release | Type | Item | Description | |
|-------|-----------------------------|---------|---------|---------|----------|-------------|--|
| | IBM WebSphere Portal Server | | | PRODUCT | IBMWASPS | | |

Details

| | |
|--|--|
| Software Name: <input type="text" value="IBM WebSphere Portal Server"/> | * Item: <input type="text" value="IBMWASPS"/> |
| Description: <input type="text"/> | Classification: <input type="text" value="IT \ SOFTWARE \ BUSINESS APPLICATION SOFTWARE"/> >> |
| Version: <input type="text"/> | Class Description: <input type="text" value="IT \ Software \ Business Application Software"/> |
| Release: <input type="text"/> | Commodity Code: <input type="text"/> |
| Type: <input type="text" value="PRODUCT"/> | Order Unit: <input type="text"/> |
| Vendor: <input type="text" value="IBM"/> | |

Default Values

| | |
|--|---|
| Item Generation: <input type="text"/> | Default Order Unit: <input type="text"/> |
|--|---|

Generate Items
Cancel



Note: The item must be classified within the top-level software class that is identified in System Settings. With this classification, you can perform item lookups in the Software Contracts application. The top-level software class was set in this lab image.

- ___ 6. Click **Generate Items**.
- ___ 7. Scroll to the **Associated Items** section.
- ___ 8. Click the **Detail Menu** icon for the IBMWASPS item and click **Go To Item Master**.

- ___ 9. Review the software item. Notice that the software option is selected and the software name is automatically populated with **IBM WebSphere Portal Server**. However, the description was inherited from the classification description. You can modify that behavior by clearing the Generate Description in the classification record.
- ___ 10. Change the description to **IBM WebSphere Portal Server**.
- ___ 11. Click the **Save Item** icon. You also want to set the Order Unit to match the license capacity type. This item is licensed using PVUs. However, the system does not have PVU defined as a unit of measure.
- ___ 12. Click **Unit of Measure and Conversion > Add/Modify Units of Measure** under More Actions in the navigation bar.
- ___ 13. Click **New Row**.
- ___ 14. Enter **PVU** for the Unit of Measure, **Processor Value Unit** for the Description, and **PVU** for the Abbreviation.

| Unit of Measure | Description | Abbreviation |
|-----------------|----------------------|--------------|
| COIL | | |
| DEG C | Degrees Centigrade | Deg C |
| DEG F | | deg f |
| EACH | | |
| EACH | EACH | EACH |
| FEET | | |
| FT HD | | Flhd |
| GALS | | |
| GBYTE | GIGABYTE | GB |
| PVU | Processor Value Unit | PVU |

Details

* Unit of Measure:
 Processor Value Unit

Abbreviation:

- ___ 15. Click **OK**.
- ___ 16. Enter **PVU** for the Order Unit and Issue Unit.
The software item cannot be used yet because it is in a Pending status.
- ___ 17. Click the **Change Status** icon.

- ___ 18. Set the status to **Active** and select the **Roll New Status to Organizations and Inventory** option.
- ___ 19. Click **OK** to change the status.
The software item is ready to use.
- ___ 20. Click **Return**.

Creating a software item in the Item Master application

- ___ 21. Click **Go To Applications > Inventory > Item Master**,
- ___ 22. Click the **New Item** icon to create an Item Master record.

- ___ 23. Enter the following information to define the software item.

| Field | Value |
|-------------|-----------------------|
| Item | IBMDBEPO |
| Description | [Leave blank for now] |
| Order Unit | PVU |
| Issue Unit | PVU |
| Software | [Selected] |

The screenshot shows the 'Create Item' screen in the IBM SmartCloud Control Desk. The 'Item' field contains 'IBMDBEPO'. The 'Item Set' is 'PMSCS1'. Under 'Commodity', 'Code' is empty, and 'Group' is empty. 'Meter Group' and 'Meter' fields are empty. 'Lot Type' is set to 'NOLOT'. 'Maximum Quantity Issued' is empty. 'Order Unit' and 'Issue Unit' are both set to 'PVU'. 'MSDS' is empty. On the right side, there are several checkboxes: 'Attachments' (unchecked), 'Status' (set to 'PENDING'), 'Rotating?' (unchecked), 'Condition Enabled?' (unchecked), 'Kit?' (unchecked), 'Capitalized?' (unchecked), 'Inspect on Receipt?' (unchecked), 'Add as Spare Part?' (unchecked), 'Attach to Parent Asset on Issue?' (unchecked), 'Software?' (checked), and '* Tax Exempt?' (set to 'N'). A note says 'Click to see image in its actual context' next to a placeholder image box.

- ___ 24. Click the **Save item** icon.
- ___ 25. Click the **Detail Menu** in the Software Name field and click **Go To Software Catalog**.
- ___ 26. Search for the Software Name **IBM DB2 Enterprise Server Edition CPU Option**.



Note: You can also perform an advanced search like you did in the first exercise.

- ___ 27. Open the top-level software product.
- ___ 28. Click **Return With Value**.

The software name is linked to the top-level **IBM DB2 Enterprise Server Edition CPU Option** software catalog entry.

- ___ 29. Click the **Vendors** tab.
- ___ 30. Click **New Row** and enter **IBM** in the Vendor field.
- ___ 31. Click the **Specifications** tab.
- ___ 32. Click the **Detail Menu** icon for the Classification field and click **Classify**.
- ___ 33. Expand **IT: Information Technology > SOFTWARE: Software and click DATA MANAGEMENT SOFTWARE:Data Management Software.**



- ___ 34. Click the **Save item** icon.
- ___ 35. Click the **Item** tab.
- ___ 36. Change the description to **IBM DB2 Enterprise Server Edition CPU Option**.
- ___ 37. Click the **Change Status** icon.
- ___ 38. Set the status to **Active** and select the **Roll New Status to Organizations and Inventory** option.
- ___ 39. Click **OK** to change the status.
The software item is ready to use.
- ___ 40. Sign out of the console.

Exercise 7-4: Creating a master contract

You can use a master contract to associate different types of contracts for the same vendor. This exercise demonstrates how to create a master contract.

- ___ 1. Log in to the console as **arun** with the password **object00**. Remember that Arun is a financial analyst.
- ___ 2. Click **Contracts > Master Contracts** in the navigation bar.
- ___ 3. Click the **New Master Contract** icon.

- ___ 4. Enter the following information to define the contract.

| Field | Value |
|--------------|-------------------------------|
| Contract | IBMSW |
| Description | IBM Software Contracts |
| Start Date | [Today's Date] |
| End Date | [1 year from Today's Date] |
| Renewal Date | [1 year from Today's Date] |
| Total Cost | 1,000,000 |
| Company | IBM |

The screenshot shows the 'View Record List > IBMSW' screen. The top navigation bar includes tabs for 'Contract', 'Properties', 'Associated Contracts', and 'Terms and Conditions'. The 'Contract' tab is selected. The main area contains several input fields and dropdown menus:

- * Contract: IBMSW (highlighted in yellow)
- Type: MASTER (highlighted in yellow)
- Status: DRAFT
- Revision: 0
- Organization: PMSCIBM
- Attachments: (link)
- Details section: Vendor Reference # (empty), Buyer (empty), Freight Terms (empty).
- Dates section: Start Date: 9/1/12, End Date: 9/1/13, Renewal Date: 9/1/13.
- Costs section: Total Cost: 1,000,000.00, * Currency: USD (highlighted in yellow), Total Base Cost: 1,000,000.00.
- Vendor section: Company: IBM (highlighted in yellow), Address (empty), Freight Terms (empty), FOB Point (empty).

- ___ 5. Click the **Properties** tab.
- ___ 6. Select the **Acceptance Loss** and **Shipping Loss** options.
- ___ 7. Review the other tabs.
- ___ 8. Click the **Save Master Contract** icon.
- ___ 9. Click the **Change Status** icon and set the Status to **Approved**.

Exercise 7-5: Creating an associated software contract

In this exercise, you create a software contract by using the software item that you created in an earlier exercise.

- ___ 1. Click **Create Associated Contract** under More Actions in the navigation bar.
- ___ 2. Enter the following information for the initial contract details.

| Field | Value |
|-------------|---------------------------------------|
| Contract | IBMWAS |
| Description | IBM WebSphere software |
| Type | Subscription Software Contract |

- ___ 3. Click **OK** to create the associated contract.
- ___ 4. Click the **Associated Contracts** tab.
- ___ 5. Click the **Detail Menu** icon for the IBMWAS Contract field and click **Go To Software Contracts**.
- ___ 6. Review the contract. Notice that some of the information is inherited from the master contract.
- ___ 7. Click the **Properties** tab and enter the following information.

| Field | Value |
|------------------|----------------|
| PO Required | [Selected] |
| Create Release | [Selected] |
| Support Levels | Premium |
| Service Coverage | 24 x 7 |

- ___ 8. Click the **Contract Lines** tab.
- ___ 9. Click **Vendor Items** in the Contract Lines section.

A list of all items associated with IBM, the vendor specified for the contract, is displayed. This list includes rotating items and software items.

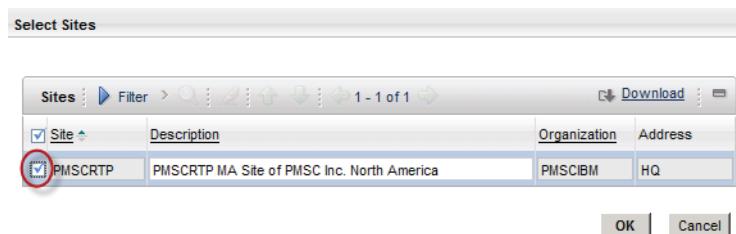
- ___ 10. Find and select the **IBMWASPS** and **ITAMWSMQ**, and items and click **OK**. You might have to go to the second page to find the last item.
- ___ 11. Enter **1000** for the Capacity for the **ITAMWSMQ** item. The Unit Cost (**100**) and the Order Unit (**PVU**) are populated from the item record. The unit cost used is the last price paid for a license. If you obtained a new price with this contract, you can change the unit cost.
- ___ 12. Enter **800** for the Capacity and **200** for the Unit Cost for the **IBMWASPS** item.



The screenshot shows a software interface for managing contract lines. The title bar says "Contract Lines". The main area is a grid with columns: Line, Line Type, Item, Description, Capacity, Order Unit, Unit Cost, Line Cost, and Utilization. Row 1 (selected) has Line 2, Line Type ITEM, Item ITAMWSMQ, Description IBM WebSphere MQ, Capacity 1,000.00, Order Unit PVU, Unit Cost 100.00, Line Cost 100,000.00, and Utilization NOTLICENSED. Row 2 has Line 1, Line Type ITEM, Item IBMWASPS, Description IBM WebSphere Portal Server, Capacity 800.00, Order Unit PVU, Unit Cost 200.00, Line Cost 160,000.00, and Utilization NOTLICENSED. Buttons at the bottom include "Payment Schedule", "Vendor Items", and "New Row".

| Line | Line Type | Item | Description | Capacity | Order Unit | Unit Cost | Line Cost | Utilization |
|------|-----------|----------|-----------------------------|----------|------------|-----------|------------|-------------|
| 2 | ITEM | ITAMWSMQ | IBM WebSphere MQ | 1,000.00 | PVU | 100.00 | 100,000.00 | NOTLICENSED |
| 1 | ITEM | IBMWASPS | IBM WebSphere Portal Server | 800.00 | PVU | 200.00 | 160,000.00 | NOTLICENSED |

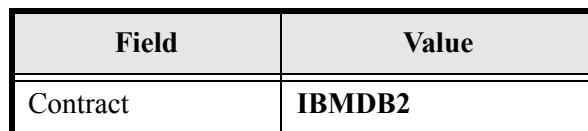
- ___ 13. Click the **Save Software Contracts** icon.
- ___ 14. Click **Authorize Sites** under More Actions in the navigation bar.
- ___ 15. Click **Select Sites** and select **PMSC RTP**.



The screenshot shows a dialog box titled "Select Sites". The title bar says "Sites". The main area is a grid with columns: Site, Description, Organization, and Address. A row for "PMSC RTP" is selected, indicated by a red circle around the checkbox. The "OK" button is visible at the bottom right.

| Site | Description | Organization | Address |
|--|---|--------------|---------|
| <input checked="" type="checkbox"/> PMSC RTP | PMSC RTP MA Site of PMSC Inc. North America | PMSCIBM | HQ |

- ___ 16. Click **OK** to add the site to the authorized list.
- ___ 17. Click **OK** to authorize the site.
- ___ 18. Click the **Change Status** icon and set the Status to **Approved**.
- ___ 19. Click **Return** to go back to the master contract.
- ___ 20. Click **Create Associated Contract** under More Actions in the navigation bar.
- ___ 21. Enter the following information for the initial contract details.



The screenshot shows a dialog box with a table for entering contract details. The table has two columns: "Field" and "Value". One row is shown with "Contract" in the Field column and "IBMDB2" in the Value column.

| Field | Value |
|----------|--------|
| Contract | IBMDB2 |

| Field | Value |
|-------------|----------------------------------|
| Description | IBM DB2 software |
| Type | General Software Contract |

- ___ 22. Click **OK** to create the associated contract.
- ___ 23. Click the **Associated Contracts** tab.
- ___ 24. Click the **Detail Menu** icon for the IBMDB2 Contract field and click **Go To Software Contracts**.
- ___ 25. Click the **Properties** tab and enter the following information.

| Field | Value |
|------------------|----------------|
| PO Required | [Selected] |
| Create Release | [Selected] |
| Support Levels | Premium |
| Support Coverage | 24 x 7 |

- ___ 26. Click the **Contract Lines** tab.
- ___ 27. Click **Vendor Items** in the Contract Lines section.
- ___ 28. Find and select the **IBMDBEPO** and **ITAMDB2WGCPU** items and click **OK**.
- ___ 29. Enter **400** for the Capacity and **150** for the Unit Cost for the **ITAMDB2WGCPU** item. Keep the Order Unit set to PVU.
- ___ 30. Enter **800** for the Capacity and **175** for the Unit Cost for the **IBMDBEPO** item. Keep the Order Unit set to PVU.

| Contract Lines | | | | | | | | | | Download |
|----------------|-----------|-------------|--|----------|------------|-----------|------------|-------------|--|----------|
| Line | Line Type | Item | Description | Capacity | Order Unit | Unit Cost | Line Cost | Utilization | | |
| 2 | ITEM | ITAMDB2WGCF | IBM DB2 Workgroup Server Edition CPU Option | 400.00 | PVU | 150.00 | 60,000.00 | NOTLICENSED | | |
| 1 | ITEM | IBMDBEPO | IBM DB2 Enterprise Server Edition CPU Option | 800.00 | PVU | 175.00 | 140,000.00 | NOTLICENSED | | |

- ___ 31. Click the **Save Software Contracts** icon.
- ___ 32. Click **Authorize Sites** under More Actions in the navigation bar.

- ___ 33. Click **Select Sites** and select **PMSC RTP**.



- ___ 34. Click **OK** to add the site to the authorized list.
- ___ 35. Click **OK** to authorize the site.
- ___ 36. Click the **Change Status** icon and set the Status to **Approved**.
- ___ 37. Click **Return** to go back to the master contract.
- ___ 38. Sign out of the console.

Exercise 7-6: Reviewing existing licenses

This exercise demonstrates how to review existing licenses. Several licenses of various license capacity types were created in the demonstration data. A few of the highlighted capacity types include:

- **Installed instance:** In an Installed instance license, charges are based on a specified number of installed instances, or *seats*, across the scope of the license.
- **Processor core:** In a processor-based license, charges are based on the number of server processors, or independent processing units. Commonly called a CPU, a processor is an independent processing unit on a unique chip within a computing device that interprets and executes instructions. With full-capacity licensing, the license capacity must be equal to or exceed the number of all activated processors that are available for use on the server.
- **PVU:** In a value unit-based license, charges are based on value units, the quantity of a specific designated measurement used for a particular program. Each program has a designated measurement. The number of value unit entitlements required for a program depends on how the program is deployed in the business environment. It must be obtained from an IBM-defined value unit table, called a *value unit exhibit*. In IBM pricing documents, *value unit* is used to mean processor value unit.

These highlighted capacity types all have license reports that can be generated. For a complete list of available license capacity types, go to the following website:

http://pic.dhe.ibm.com/infocenter/tivihelp/v51r1/topic/com.ibm.tusc.doc/administering_tamit/c_capacity_units.html



Note: Not all capacity types have license audit reports that can be generated. For a complete list of available license audit reports, go to the following website:

http://pic.dhe.ibm.com/infocenter/tivihelp/v51r1/topic/com.ibm.tusc.doc/administering_tamit/c_report_templates_included_product.html

- ____ 1. Log in to the console as **ling** with the password **object00**.
- ____ 2. Click **Assets > Licenses** in the navigation bar.
- ____ 3. Press Enter to return a list of all licenses.
- ____ 4. Review the list. Notice the different capacity units.

| Licenses | Filter | Search | Print | Download | ... | | | |
|----------|--|--------|----------------|-----------|----------|----------|---------------|--------------------|
| License | Description | Status | Terminate Date | Vendor | Customer | Capacity | Capacity Unit | Available Capacity |
| ITAM1008 | PVU License for IBM WebSphere Application Server Network Deployment | ACTIVE | | IBM | | 700 | VALUNITS | 700.00 |
| ITAM1009 | PVU License for IBM DB2 Workgroup Server Edition CPU Option | ACTIVE | | IBM | | 1,000 | VALUNITS | 1,000.00 |
| ITAM1010 | PVU License for IBM WebSphere MQ | ACTIVE | | IBM | | 1,500 | VALUNITS | 1,500.00 |
| ITAM1011 | Processor Core License for MS SQL 2005 | ACTIVE | | COMPDEPOT | | 4 | PROCCORE | 4.00 |
| ITAM1013 | Installed Instance License Symantec Norton AntiVirus Corporate Edition | ACTIVE | | COMPDEPOT | | 14 | INSTINST | 14.00 |
| ITAM1012 | Installed Instance License for Adobe Acrobat | ACTIVE | | COMPDEPOT | | 5 | INSTINST | 5.00 |

- ____ 5. Open the **ITAM1010 PVU Full Capacity Based License WebSphere MQ** license.
- ____ 6. Review the license.
- ____ 7. Scroll to the **Scope** section and review the information. The capacity unit is **VALUNITS** and the capacity is **1500**. Notice that there is no capacity allocated. You add capacity and allocate licenses in Exercise 7-10, “Receiving software” on page 7-26 and Exercise 7-12, “Reviewing and allocating licenses” on page 7-30.
- ____ 8. Click **View Record List** to return to the list of licenses.
- ____ 9. Open the **ITAM1012 Installed Instance License for Adobe Acrobat** license.
- ____ 10. Review the license.
- ____ 11. Scroll to the **Scope** section and review the information.
For this license, the organization is entitled to five installed instances of Adobe Acrobat. You run an audit report in Exercise 7-15, “Running license audit reports” on page 7-41 to verify that entitlement is not exceeded.
- ____ 12. Click **View Record List** to return to the list of licenses.

Exercise 7-7: Manually creating a license

License can be created in two ways:

- Manually in the License application.
- Automatically during the receiving process.

License templates can be applied to draft licenses to define basic parameters. This exercise demonstrates how to create a license manually and apply license templates.

Creating a license without a template

- ____ 1. Verify that you are in the **License** application. If not, click **Assets > Licenses**.
- ____ 2. Click the **New License** icon.

3. Enter the following information to define a license for **IBM DB2 Enterprise Server Edition CPU Option**.

| Field | Value |
|---------------|---|
| License | ITAM1014 |
| Description | PVU Base: IBM DB2 Enterprise Server Edition CPU Option |
| Type | IPLA |
| Platform | Distributed |
| Vendor | IBM |
| Scope | ENTERPRISE |
| License Term | INSTALLED |
| Capacity Unit | VALUNITS |
| Capacity | 200 |

| | | |
|---|--|---|
| * License: <input type="text" value="ITAM1014"/> PVU Base: IBM DB2 Enterprise Server Edition CPU Option | * Type: <input type="text" value="IPLA"/> | Status: <input type="text" value="DRAFT"/> |
| License Name: <input type="text"/> | * Platform: <input type="text" value="DISTRIBUTED"/> | Organization: <input type="text" value="PMSCIBM"/> |
| Serial Number: <input type="text"/> | GL Account: <input type="text"/> | Attachments |
| * Vendor: <input type="text" value="IBM"/> | Responsible Party: <input type="text"/> | |
| Customer: <input type="text"/> | Customer Charge Account: <input type="text"/> | |
| | Customer Cost Center: <input type="text"/> | |
| Scope | | |
| * Scope: <input type="text" value="ENTERPRISE"/> | * Capacity Unit: <input type="text" value="VALUNITS"/> | * Capacity: <input type="text" value="200"/> |
| * License Term: <input type="text" value="INSTALLED"/> | * Start Date: <input type="text" value="9/1/12"/> | Allocated Capacity: <input type="text" value="0.00"/> |
| Is Sub-Capacity? <input type="checkbox"/> | Terminate Date: <input type="text"/> | Reserved Capacity: <input type="text" value="0.00"/> |
| License Charge Period: <input type="text" value="DAILY"/> | Core Multiplier Group: <input type="text"/> | Available Capacity: <input type="text" value="200.00"/> |

4. Click **Select Software** in the Associated Products section.

- ___ 5. Enter **IBMDBEPO** in the Item field and click **Refine**. This filter ensures that you select the product associated with the IBMDBEPO software item that you created in a previous exercise.
- ___ 6. Select the **IBM DB2 Enterprise Server Edition CPU Option** product and click **OK**.

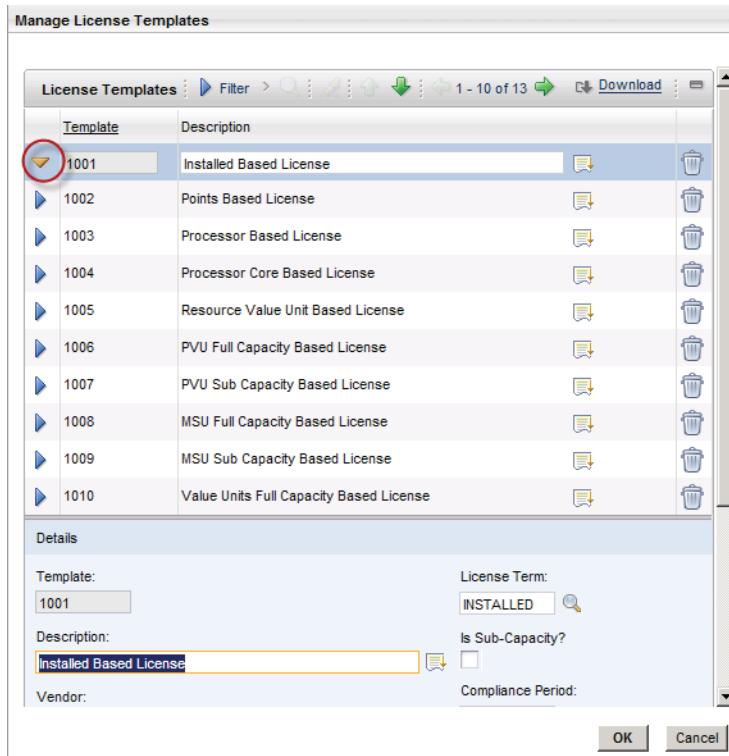
| Software Name | Version | Release | Manufacturer | Managed As | Uses PVU? | Total Deployed |
|--|---------|---------|--------------|------------|-------------------------------------|----------------|
| IBM DB2 Enterprise Server Edition CPU Option | | | IBM | | <input checked="" type="checkbox"/> | 0 |

- ___ 7. Click the **Change Status** icon and set the Status to **Active status**.
- ___ 8. Click **View Record List** to return to the list of licenses.

Creating a license with a template

- ___ 9. Click the **New License** icon.
- ___ 10. Click **Manage License Templates** under More Actions in the navigation bar.
- ___ 11. Review the license templates. In this window, you can create new license templates or modify the product-provided templates.

- _____ 12. Click the **View Details** icon for the 1001 Installed Based License template.



- _____ 13. Review the detail settings for this template.
_____ 14. Click **Cancel** to return to the license record.
_____ 15. Click **Apply License Template** under More Actions in the navigation bar.
_____ 16. Click the **1001 Installed Based License** template to select it and click **OK**. Notice that some of the fields are completed for you, including the description, scope, license term, and capacity unit.

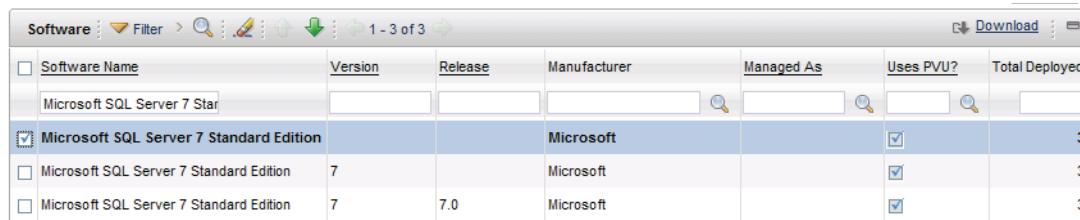
- ___ 17. Update the following fields to define a license for **Microsoft SQL Server 7 Standard Edition**.

| Field | Value |
|-------------|--|
| License | ITAM1015 |
| Description | Installed Base: Microsoft SQL Server 7 Standard Edition |
| Vendor | COMPDEPOT |
| Capacity | 3 |

The screenshot shows the 'Create License' screen in the IBM SmartCloud Control Desk. The 'Scope' section is expanded, displaying 'ENTERPRISE' as the scope, 'INSTINST' as the capacity unit, and a capacity of '3'. Other visible fields include 'Start Date' (9/1/12), 'Allocated Capacity' (0.00), and 'Available Capacity' (0.00). The 'Scope' section also includes fields for 'License Term' (INSTALLED), 'Is Sub-Capacity?' (unchecked), 'License Charge Period' (DAILY), and 'Core Multiplier Group'.

- ___ 18. Click **Select Software** in the Associated Products section.
- ___ 19. Enter **Microsoft SQL Server 7 Standard Edition** in the Software Name field and press Enter.

- ___ 20. Select the top-level **Microsoft SQL Server 7 Standard Edition** product and click **OK**.



A screenshot of a software management interface titled "Software". It shows a list of products with columns for Software Name, Version, Release, Manufacturer, Managed As, Uses PVU?, and Total Deployed. The first row is "Microsoft SQL Server 7 Standard Edition" with a checked checkbox. The second row is "Microsoft SQL Server 7 Standard Edition" with version 7 and release 7.0, also with a checked checkbox. The third row is "Microsoft SQL Server 7 Standard Edition" with version 7 and release 7.0, also with a checked checkbox.

| Software Name | Version | Release | Manufacturer | Managed As | Uses PVU? | Total Deployed |
|---|---------|---------|--------------|------------|-------------------------------------|----------------|
| Microsoft SQL Server 7 Standard Edition | | | Microsoft | | <input checked="" type="checkbox"/> | 3 |
| Microsoft SQL Server 7 Standard Edition | 7 | | Microsoft | | <input checked="" type="checkbox"/> | 3 |
| Microsoft SQL Server 7 Standard Edition | 7 | 7.0 | Microsoft | | <input checked="" type="checkbox"/> | 3 |

- ___ 21. Click the **Change Status** icon and set the Status to **Active status**.

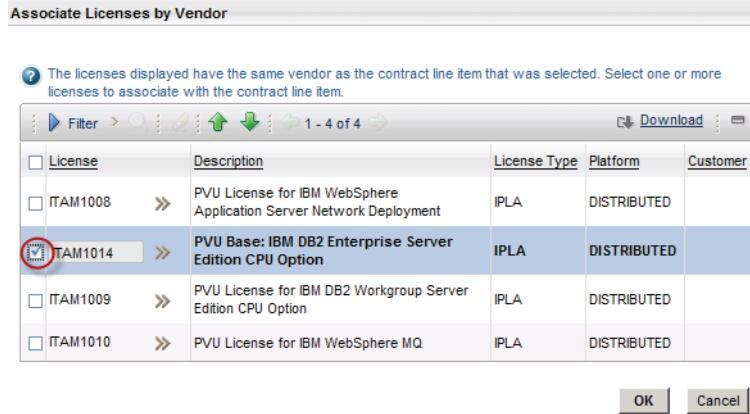
Exercise 7-8: Associating a license with a contract

You can associate licenses with contracts. This feature helps software asset managers see the relationship between licenses and contracts. This exercise demonstrates how to manually associate licenses with contracts.

- ___ 1. Click **Go To Applications > Contracts > Software Contracts**.
- ___ 2. Find and open the **IBMDB2** contract that you created in Exercise 7-5, “Creating an associated software contract” on page 7-13.
- ___ 3. Click the **Contracts Lines** tab.
- ___ 4. Click the **IBMDBEPO** line item to select it in the Contract Lines section.
- ___ 5. Click **Associate by Vendor** in the Associated License section.

The vendor for the contract is IBM. Therefore, a list of active IBM licenses is displayed.

- ___ 6. Select the DB2 license **ITAM1014** and click **OK**.



A screenshot of a dialog box titled "Associate Licenses by Vendor". It contains a message: "The licenses displayed have the same vendor as the contract line item that was selected. Select one or more licenses to associate with the contract line item." Below this is a table with columns: License, Description, License Type, Platform, and Customer. The table has five rows. The second row (ITAM1008) has a circled checkbox. The fourth row (ITAM1014) has a circled checked checkbox. The fifth row (ITAM1009) has a circled checkbox. The sixth row (ITAM1010) has a circled checkbox. At the bottom are "OK" and "Cancel" buttons.

| License | Description | License Type | Platform | Customer |
|----------|---|--------------|-------------|----------|
| ITAM1008 | PVU License for IBM WebSphere Application Server Network Deployment | IPLA | DISTRIBUTED | |
| ITAM1014 | PVU Base: IBM DB2 Enterprise Server Edition CPU Option | IPLA | DISTRIBUTED | |
| ITAM1009 | PVU License for IBM DB2 Workgroup Server Edition CPU Option | IPLA | DISTRIBUTED | |
| ITAM1010 | PVU License for IBM WebSphere MQ | IPLA | DISTRIBUTED | |

- ___ 7. Click the **ITAMDB2WGCPU** line item to select it in the Contract Lines section.
- ___ 8. Click **Associate by Vendor** in the Associated License section.
The vendor for the contract is IBM. Therefore, a list of active IBM licenses is displayed.
- ___ 9. Select the DB2 license **ITAM1009** and click **OK**.
- ___ 10. Click the **Save Software Contracts** icon.
- ___ 11. Click the **Associated Licenses** tab and review the details. Notice that the PVU licenses are in the list.

| | Line Item | Type | Description | Vendor | Scope | Capacity |
|---|----------------|------|---|--------|------------|----------|
| ▶ | 1 IBMDBEPO | IPLA | PVU Base: IBM DB2 Enterprise Server Edition CPU Option | IBM | ENTERPRISE | 200 |
| ▶ | 2 ITAMDB2WGCPU | IPLA | PVU License for IBM DB2 Workgroup Server Edition CPU Option | IBM | ENTERPRISE | 1,000 |

- ___ 12. Sign out of the console.

Exercise 7-9: Creating a release purchase order

In this exercise, you create a release purchase order from the software contract that you created in Exercise 7-5, “Creating an associated software contract” on page 7-13. The Purchase Orders application was enhanced to include a License field. Because a license has not yet been created, this field is blank and the license is not created until the software is received.

- ___ 1. Log in to the console as **arun** with the password **object00**.
- ___ 2. Click **Contracts > Software Contracts** in the navigation bar.
- ___ 3. Find and open the **IBMWAS** contract.
- ___ 4. Click **Create Release PO** under More Actions in the navigation bar.
- ___ 5. Click **Autonumber** to give the PO a number. You might have to scroll to the right to see the **Autonumber** button.
- ___ 6. Write down the PO number: _____.

- ___ 7. Select the two Contract Line Items.
- ___ 8. Scroll to the **Release Charge Values** section.
- ___ 9. Enter **1234-567-890** for the GL Debit Account. You must charge the purchase to an entity such as a storeroom, work order, asset, or GL debit account. In this example, you charge the PO to a GL account.

The screenshot shows the 'Create Release PO' window. At the top, there are fields for 'Description' (IBM WebSphere software) and 'Vendor' (IBM). Below these are sections for 'Contract Lines' and 'Release Charge Values'. The 'Contract Lines' table lists two items: IBM WASP and IBM WebSphere MQ, both selected. The 'Release Charge Values' section includes fields for Work Order, Location, Asset, Storeroom, GL Debit Account (set to 1234-567-890), and Site.

| Line | Item | Description | Order Unit | Quantity | Issue Unit | Conversion Factor | Manufacturer | Model |
|------|----------|-----------------------------|------------|----------|------------|-------------------|--------------|-------|
| 1 | IBMWASPS | IBM WebSphere Portal Server | PVU | 800.00 | | | | |
| 2 | ITAMWSMQ | IBM WebSphere MQ | PVU | 1,000.00 | | | IBM | |

- ___ 10. Click **OK**.
- ___ 11. Click **Go To Applications > Purchasing > Purchase Orders**.
- ___ 12. Find and open the PO that you wrote down in Step 6.



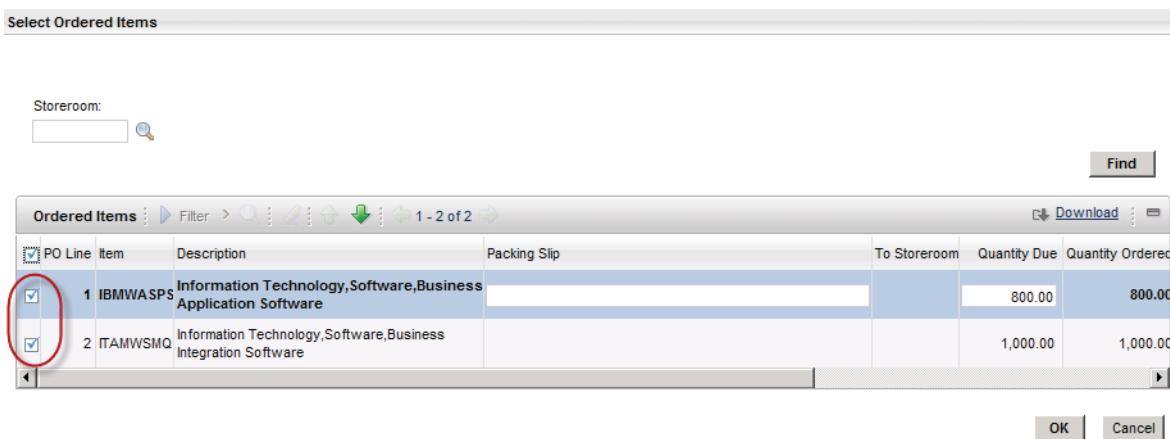
Note: The Type is REL, and the contract reference and vendor information is completed.

- ___ 13. Click the **PO Line** tab and review the PO Lines.
- ___ 14. Click the **Approve Purchase Order** icon and set the status to **Approved**.
The purchase order is approved and is ready for the receiving process.
- ___ 15. Sign out of the console.

Exercise 7-10: Receiving software

This exercise demonstrates how to receive the software items. During the receiving process, you can create the license for the software and add the capacity identified in the Quantity field of the purchase order.

- ___ 1. Log in to the console as **maria** with the password **object00**.
- ___ 2. Click the **Receiving Manager** Start Center tab.
- ___ 3. Find and open the purchase order that you created for the WebSphere Software in the PO's waiting Receipt portlet. You might have to go to the second page.
- ___ 4. Click **Select Ordered Items** on the Material Receipts tab.
- ___ 5. Select both PO Line Items and click **OK**.

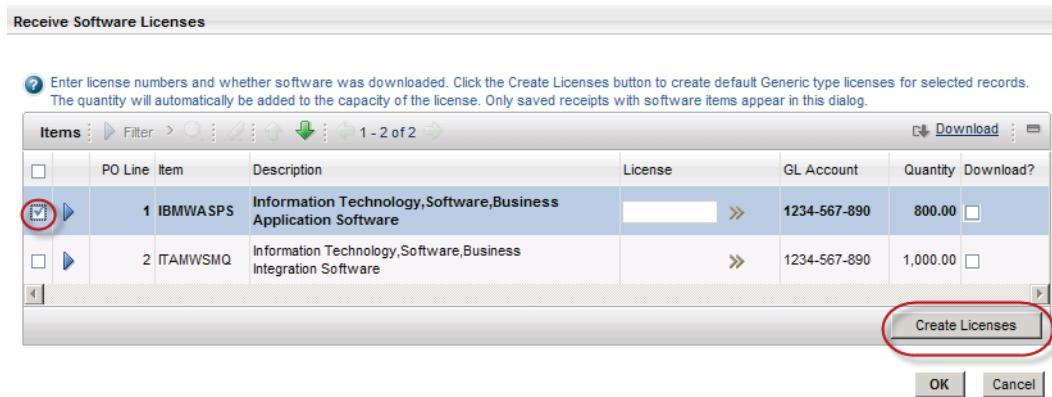


- ___ 6. Click the **Save Receipt** icon. Notice that the Inspection Status is set to COMP (Complete). Software is not inspected like hardware. However, License Required is selected for both products. To receive the software items, you must create a license.

| PO Line | Item | Description | Quantity | Order Unit | Type | Insp. Status | License Required? | Actual Date |
|---------|----------|---|----------|------------|---------|--------------|-------------------------------------|--------------|
| 1 | IBMWASPS | Information Technology,Software,Business Application Software | 800.00 | PVU | RECEIPT | COMP | <input checked="" type="checkbox"/> | 9/1/12 03:26 |
| 2 | ITAMWSMQ | Information Technology,Software,Business Integration Software | 1,000.00 | PVU | RECEIPT | COMP | <input checked="" type="checkbox"/> | 9/1/12 03:26 |

- ___ 7. Click **Receive Software Licenses** under More Actions in the navigation bar.

- ___ 8. Select the **IBMWASPS** item and click **Create Licenses**. Do not select the other item. A license exists for that item, and you add capacity in a later step.



- ___ 9. Review the system message. It indicates that when you click OK on the Receive Software Licenses window, a new generic license is created. There are a few downsides to automatically creating the license. These issues are covered in subsequent steps.

- ___ 10. Write down the license number: _____.

- ___ 11. Click **Close** to dismiss the system message. Notice that the license field for the **IBMWASPS** item was updated with the license number that is indicated in the system message.



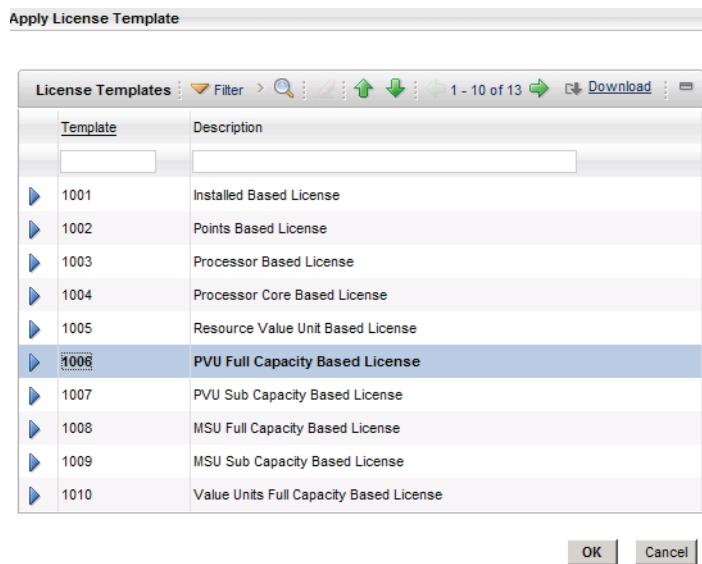
- ___ 12. Click **OK** to create the generic license for the IBM WebSphere Portal Server software.

- ___ 13. Click **Receive Software Licenses** under More Actions in the navigation bar.

- ___ 14. Click the **Detail Menu** icon for the license field for the ITAMWSMQ PO Line item and click **Select Value**.

- ___ 15. Click the **ITAM1010** license to select it.

- ___ 16. Click **OK** to add capacity to the ITAM1010 license. Notice that all of the License Required fields are cleared.
- ___ 17. Sign out of the console.
- ___ 18. Log in to the console as **ling** with the password **object00**.
- ___ 19. Click **Assets > Licenses** in the navigation bar.
- ___ 20. Find and open the license for IBM WebSphere Portal Server that you wrote down in Step 10. Default settings were used to create the license. These settings do not match what is needed for the license. Therefore, you must edit the license. One approach to avoiding these problems is to create a draft license in the license application before receiving the license. When you receive the license, you can select the draft license that has the correct details. The capacity is added to that draft license, and the license is activated.
- ___ 21. Click the **Change Status** icon and set the status to **Draft**.
- ___ 22. Click **Apply License Templates** under More Actions in the navigation bar.
- ___ 23. Click the **1006 PVU Full Capacity Based License** template to select it and click **OK**.



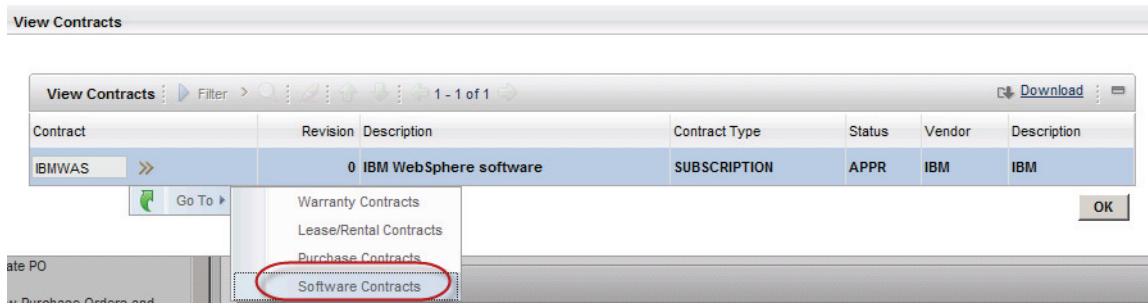
- ___ 24. Change the Description to **PVU Full Capacity Based License: WebSphere Portal Server**.
- ___ 25. Change the Type to **IPLA**.
- ___ 26. Click the **Change Status** icon and set the status to **Active status**.
- ___ 27. Click **View Record List**.

- _____ 28. Find and open the **ITAM1010** license. In Exercise 7-6, “Reviewing existing licenses” on page 7-16, you reviewed this license and it only had a capacity of **1500**. The capacity is now **2500** after the capacity was added during the receiving process.

Exercise 7-11: Viewing PRs, POs, and contracts for a license

When you use the financial features in IBM SmartCloud Control Desk, links are established between all of the records. If you received a license from a purchase order that was created from a contract, you can view the relationship between the records. This exercise demonstrates how to view PRs, POs, and contracts for a license.

- _____ 1. Verify that you are viewing the **ITAM1010** license.
- _____ 2. Click **View Purchase Orders and Requisitions** under More Actions in the navigation bar.
- _____ 3. Review the PO list.
- _____ 4. Click **OK** to close the View Purchase Orders and Requisitions window.
- _____ 5. Click **View Contracts** under More Actions in the navigation bar.
- _____ 6. Review the Contract list.
- _____ 7. Click the **Detail Menu** icon for the contract and click **Go To > Software Contracts** to review the contract.



- _____ 8. Click the **Associated License** tab and review the licenses. These licenses are the licenses that you work with during the receiving process.
- _____ 9. Click **Return** to go back to the license.
- _____ 10. Click **OK** to close the View Contracts window.
- _____ 11. Click the **Costs** tab and click the **View Details** icon for the License Costs row.



Note: The transaction type is LICRECEIPT, and the GL debit account was assigned in the PO release. The GL credit account is the default Company Related Account for Received But Not Invoiced (RBNI) from vendors. The PO information is saved along with the total charge for the PO of \$100,000.00.

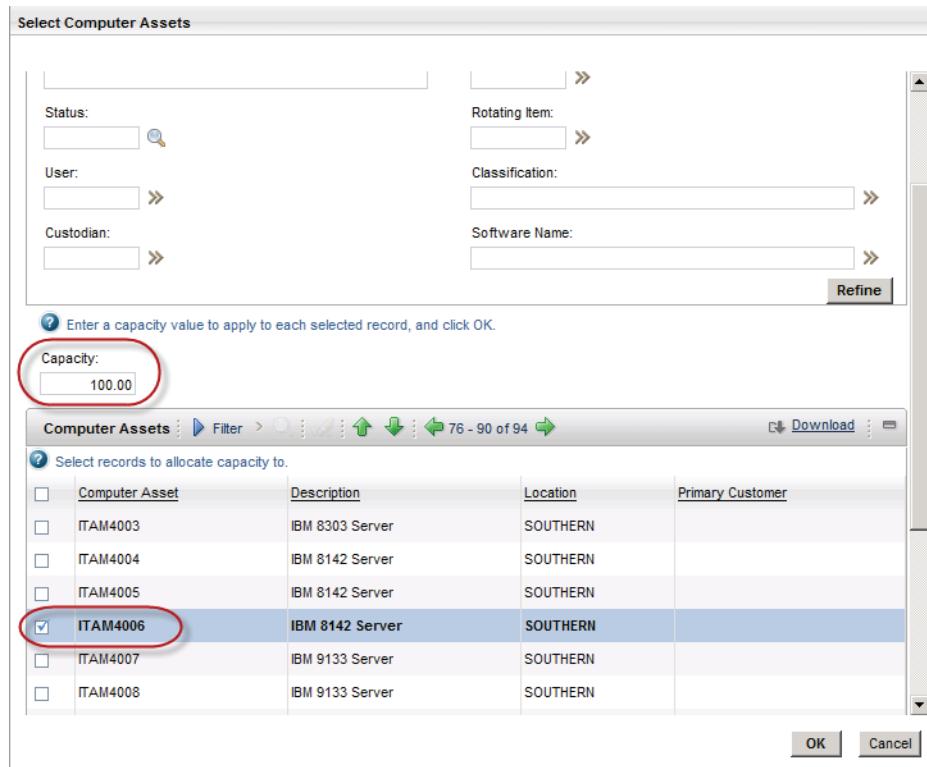
Exercise 7-12: Reviewing and allocating licenses

In this exercise, you review the license that you created through the contract and procurement process in the previous unit. The license is activated and has the capacity that was identified in the purchase order and receiving applications. The software catalog product is associated with the license, based on the software item you created in the Item Master application. With this link between the license and software catalog, you can run license audit reports.

You also allocate license capacity to a computer asset. After the capacity is allocated to the computer asset, you can then go to the Assets application and view the licenses that are associated with the asset.

- ___ 1. Verify that you are viewing the **ITAM1010** license. If not, click **Assets > Licenses** in the navigation bar and find and open it.
- ___ 2. Click the **License** tab.
- ___ 3. Scroll to the **Allocations** section.
- ___ 4. Click the **Computer Assets** subtab.

- ___ 5. Click **Select Computer Assets**.
- ___ 6. Enter **100** for the Capacity.
- ___ 7. Find and select **ITAM4006** and click **OK**.



- ___ 8. Click the **Save** icon.
- ___ 9. Click the **Detail Menu** icon for the ITAM4006 asset and click **Go To Assets**.
- ___ 10. Click the **IT Details** tab.
- ___ 11. Review the **Software Products** and **Software Licenses** sections.

The software license that you allocated is listed.

| Software Products | | | | | | | |
|-------------------|----------------------------------|---------|--------------|-----------------|---------------|--------------------------|--------------|
| Software Name | Version | Release | License Name | Role | Platform | Deleted? | Manufacturer |
| IBM WebSphere MQ | | | ITAM1010 >> | SOFTWAREPRODUCT | DISTRIBUTED | <input type="checkbox"/> | IBM |
| Software Licenses | | | | | | | |
| License Name | Description | Type | Status | Capacity | Capacity Unit | | |
| ITAM1010 >> | PVU License for IBM WebSphere MQ | IPLA | ACTIVE | 2,500 | VALUNITS | | |

- ___ 12. Click **Return** to go back to the license.

- ___ 13. Scroll to the **Scope** section and review the capacity values. The Allocated Capacity is now **100** and Available Capacity is **2500**.

Exercise 7-13: Using work orders to reserve licenses

This exercise demonstrates how you can use work orders to reserve license capacity.

- ___ 1. Click **Go To Applications > Work Orders > Work Order Tracking**.
- ___ 2. Click the **New Work Order** icon.
- ___ 3. Write down the work order number: _____.
- ___ 4. Enter the following details for the work order.

| Field | Value |
|---------------|--|
| Description | Install WebSphere Portal instance and DB2 for new website |
| Target Start | [<i>Today</i>] |
| Target Finish | [<i>2 days from today</i>] |

- ___ 5. Click the **Plans** tab.
- ___ 6. Scroll to the **Tasks for Work Order** section.
- ___ 7. Click **New Row** in the Tasks for Work Order section.

- ___ 8. Enter the following details for the first task.

| Field | Value |
|--------------------|--|
| Task | 10 |
| Description | Install IBM DB2 Workgroup Server Edition for the database backend |
| Classification | PMSCCMMI |
| Owner Group | PMSCOS |
| Estimated Duration | 1:00 (1 hours) |

The screenshot shows a software interface for managing work orders. At the top, there's a toolbar with various icons like Filter, Search, and Save. Below it is a header bar with tabs: Sequence, Task, Summary, Estimated Duration, Status, Owner, and Owner Group. The main area displays a single task entry for sequence 10. The task details are as follows:

- * Task: 10, Description: Install IBM DB2 Workgroup Server Edition for the database backend.
- Sequence: 10
- Status: WAPPR
- Classification: PMSCCMMI
- Classification Description: (empty)
- Under Flow Control? (checkbox)
- Flow Action: (empty)
- Suspend Flow Control? (checkbox)
- Flow Action Assist? (checkbox)
- Launch Entry Name: (empty)
- Attachments: (empty)
- Inherit Status Changes? (checkbox checked)
- Accepts Charges? (checkbox checked)
- Owner: (empty)
- Owner Group: (empty)
- Route: (empty)

- ___ 9. Click **New Row** in the Tasks for Work Order section.

- ___ 10. Enter the following details for the second task.

| Field | Value |
|--------------------|---|
| Task | 20 |
| Description | Install WebSphere Portal Server in a cluster environment (3 Servers) |
| Classification | PMSCCMMI |
| Owner Group | PMSCOS |
| Estimated Duration | 3:00 (3 hours) |

- ___ 11. Click the **Licenses** subtab at the bottom of the Plans tab.

The screenshot shows the 'Licenses' subtab selected in the top navigation bar. The table below displays the following data:

| Task | Software Name | License Number | Comment | Requested Capacity | Line Cost |
|------|---|----------------|---------|--------------------|-----------|
| 10 | IBM DB2 Workgroup Server Edition CPU Option | ITAM1009 | | 200 | 150 |

- ___ 12. Click **New Row** in the Licenses section.

- ___ 13. Enter the following information for the license plans.

| Field | Value |
|--------------------|----------|
| Task | 10 |
| License Number | ITAM1009 |
| Requested Capacity | 200 |
| Line Cost | 150 |

The screenshot shows the 'Licenses' subtab selected. A new row has been added with the following data:

| Task | Software Name | License Number | Comment | Requested Capacity | Line Cost |
|------|---|----------------|---------|--------------------|-----------|
| 10 | IBM DB2 Workgroup Server Edition CPU Option | ITAM1009 | | 200 | 150 |

Details

Task: 10
Capacity Unit: VALUNITS
PR: >>

License Number: ITAM1009
* Requested Capacity: 200.00
PR Line:

Software Name: IBM DB2 Workgroup Server Edition CPU Option
* Line Cost: 150.00
Requested By: LING >>

Version:
Comment: >>

Release:
Requested Date: 9/1/12 04:05:32
Required Date: 9/1/12 03:59:17



Note: When the first task (Task 10) to install DB2 is approved, a license reservation is entered for 200 PVUs on the ITAM1009 license (PVU License for IBM DB2 Workgroup Server Edition CPU Option).

- ___ 14. Click **New Row** in the Licenses section.
- ___ 15. Enter the following information for the license plans.

| Field | Value |
|--------------------|---|
| Task | 20 |
| License Number | License number for WebSphere Portal Server license (Refer to Exercise 7-10, “Receiving software” on page 7-26 Step 10) |
| Requested Capacity | 600 |
| Line Cost | 200 |

| Licenses | | | | | | | |
|----------|--|--|---------------|----------------|---------|--------------------|-----------|
| | | Task | Software Name | License Number | Comment | Requested Capacity | Line Cost |
| 10 | | IBM DB2 Workgroup Server Edition CPU O | ITAM1009 | | | 200.00 | 150.00 |
| 20 | | IBM WebSphere Portal Server | 1004 | | | 600.00 | 200.00 |

Details

Task: Capacity Unit: PR:

License Number: * Requested Capacity: PR Line:

Software Name: * Line Cost: Requested By: >

Version: Comment:

Release: Requested Date:

Platform: Required Date:



Note: When the second task (Task 20) to install WebSphere Portal is approved, a license reservation is entered for 600 PVUs on the license you created (PVU Full Capacity Based License: WebSphere Portal Server).

- ___ 16. Click the **Approve Work Order** icon and set the status to **Approved**. When the work order is approved, the license capacity for the two licenses is reserved.
- ___ 17. Click **Go To Applications > Assets > Licenses**.
- ___ 18. Find and open the **ITAM1009** license.
- ___ 19. Scroll to the **Scope** section. Verify that the Reserved Capacity is **200**. Also, notice that the available capacity is **800**. This value is the Capacity minus the Reserved Capacity.

- ___ 20. Click **View Record List**.
- ___ 21. Find and open the **WebSphere Portal Server** license.
- ___ 22. Scroll to the **Scope** section. Verify that the Reserved Capacity is **600**. Also, notice that the available capacity is **200**. This value is the Capacity minus the Reserved Capacity.
- ___ 23. Sign out of the console.

Exercise 7-14: Allocating licenses in a work order

In this exercise, you allocate the license that was reserved in the work order in Exercise 7-13, “Using work orders to reserve licenses” on page 7-32.

- ___ 1. Log in to the console as **nancy** with the password **object00**. Nancy is an operations specialist. She is a member of the PMSCOS group that was assigned the work order tasks created in exercise 7-13.
- ___ 2. Click the **Operations Specialist** Start Center tab.
- ___ 3. Find the work orders for the DB2 and WebSphere Portal Server installation tasks in the Group Task Queue portlet.

| Activity | Summary | Priority | Status | Owner | Owner Group | Target Start | Target Finish |
|----------|--|----------|---------|-------|-------------|-----------------|-----------------|
| 1170 | Install IBM DB2 Workgroup Server Edition for the database backend | APPR | Pending | Nancy | PMSCOS | 9/1/12 03:59:17 | 9/3/12 03:59:17 |
| 1171 | Install WebSphere Portal Server in a cluster environment (3 Servers) | APPR | Pending | Nancy | PMSCOS | 9/1/12 03:59:17 | 9/3/12 03:59:17 |

- ___ 4. Open the **Install IBM DB2 Workgroup Server Edition for the database backend** task.
- ___ 5. Click the **Take Ownership** icon. The owner is changed to Nancy. At this point, Nancy installs DB2 for this project. After DB2 is installed, Nancy updates the Actuals information for the work order.
- ___ 6. Click the **Actuals** tab.
- ___ 7. Click the **Licenses** subtab.

- _____ 8. Click **Allocate Licenses**. Notice that the reserved licenses information is provided.

| License Number | Description | Task | Capacity | Available Capacity | Capacity Reserved for Work Order | Customer |
|----------------|---|-------|----------|--------------------|----------------------------------|----------|
| ITAM1009 | PVU License for IBM DB2 Workgroup Server Edition CPU Option | 1,000 | 800.00 | | 200.00 | |

| Location | Description | Type | Status | Primary Customer | Capacity |
|--------------------------|-------------|------|--------|------------------|----------|
| ...No rows to display... | | | | | |

Select Locations **New Row**

OK **Cancel**

- _____ 9. Click the **Computer Assets** subtab.

- _____ 10. Click **Select Computer Assets**.

- _____ 11. Enter **200** for the Capacity. This capacity value is applied to all assets that you select in the list.

- _____ 12. Find and select **ITAM3004** and click **OK**.

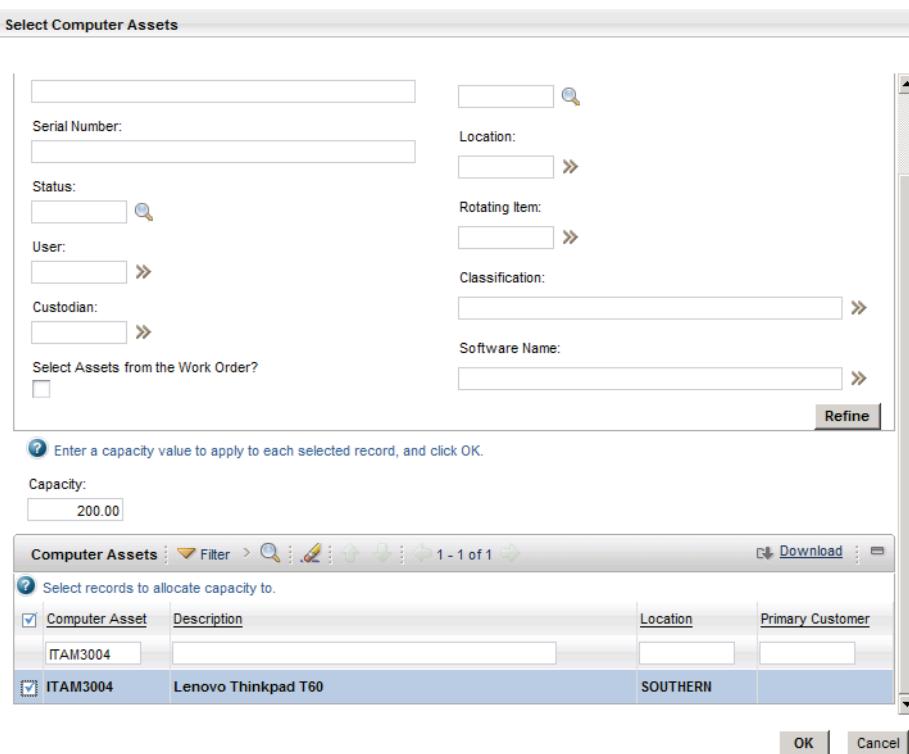
| Computer Asset | Description | Location | Primary Customer |
|----------------|---------------------|----------|------------------|
| ITAM3004 | Lenovo Thinkpad T60 | SOUTHERN | |

Refine

OK **Cancel**

- ___ 13. Review the allocation. Verify that the capacity of 200 PVUs is allocated to the asset. Notice that the capacity reserved for the work order was reduced to zero (0).
- ___ 14. Click **OK** to allocate the license to the ITAM3004 asset.
- ___ 15. Click the **Complete Activity** icon and set the status to **Completed**.
- ___ 16. Click the **Start Center** icon to return to the Operations Specialist start center.
- ___ 17. Open the **Install WebSphere Portal Server in a cluster environment (3 Servers)** task.
- ___ 18. Click the **Take Ownership** icon. The owner is changed to Nancy. At this point, Nancy installs WebSphere Portal Server on three servers for this project. After WebSphere Portal Server is installed, Nancy updates the Actuals information for the work order.
- ___ 19. Click the **Actuals** tab.
- ___ 20. Click the **Licenses** subtab.
- ___ 21. Click **Allocate Licenses**. Notice that the reserved licenses information is provided. The 600 PVUs are reserved for all three instances of WebSphere Portal Server. Each instance requires 200 PVUs.
- ___ 22. Click the **Computer Assets** subtab.
- ___ 23. Click **Select Computer Assets**.
- ___ 24. Enter **200** for the Capacity. This capacity value is applied to all assets that you select in the list.

- ___ 25. Find and select **ITAM3004** and click **OK**.



- ___ 26. Review the allocation. Verify that the capacity of 200 PVUs is allocated to the asset.
Notice that the capacity reserved for the work order was reduced to **400**.

- ___ 27. Click **OK** to allocate the license to the ITAM3004 asset.

- ___ 28. Click **Allocate Licenses**.

- ___ 29. Click **Select Computer Assets**.

- ___ 30. Enter **200** for the Capacity.

- ___ 31. Find and select **ITAM3005** and click **OK**.

- ___ 32. Review the allocation. Verify that the capacity of 200 PVUs is allocated to the asset.
Notice that the capacity reserved for the work order was reduced to **200**.

- ___ 33. Click **OK** to allocate the license to the ITAM3005 asset.

- ___ 34. Click **Allocate Licenses**.

- ___ 35. Click **Select Computer Assets**.

- ___ 36. Enter **200** for the Capacity.

- ___ 37. Find and select **ITAM3006** and click **OK**.

- ___ 38. Review the allocation. Verify that the capacity of 200 PVUs is allocated to the asset.
 Notice that the capacity reserved for the work order was reduced to zero (0).

| License Number | Description | Task Capacity | Available Capacity | Capacity Reserved for Work Order | Customer |
|----------------|---|---------------|--------------------|----------------------------------|----------|
| 1004 | PVU Full Capacity Based License: WebSphere Portal Server | 800 | 200.00 | 0.00 | |

| Computer Asset | Description | Primary Customer | Capacity |
|----------------|---------------------|------------------|----------|
| ITAM3006 | Lenovo Thinkpad T60 | | 200.00 |

OK **Cancel**

- ___ 39. Click **OK** to allocate the license to the ITAM3006 asset.
- ___ 40. Click the **Complete Activity** icon and set the status to **Completed**.
- ___ 41. Sign out of the console.
- ___ 42. Log in to the console as **ling** with the password **object00**.
- ___ 43. Click **Assets > Licenses**.
- ___ 44. Find and open the **ITAM1009** license.
- ___ 45. Scroll to the **Scope** section. Verify that the Reserved Capacity is **0**. The reservation was released when the actuals information was entered. Also, notice that the available capacity is the Capacity minus the Reserved Capacity, **800**.
- ___ 46. Scroll to the **Allocations** section.
- ___ 47. Click the **Computer Asset** subtab. Notice the computer asset that you allocated the license to is listed.
- ___ 48. Click **View Record List**.
- ___ 49. Find and open the **WebSphere Portal Server** license.
- ___ 50. Scroll to the **Scope** section. Verify that the Reserved Capacity is **0**. The reservation was released when the actuals information was entered. Also, notice that the available capacity is the Capacity minus the Reserved Capacity, **200**.
- ___ 51. Scroll to the **Allocations** section.

- ___ 52. Click the **Computer Asset** subtab. Notice the computer assets that you allocated the license to are listed.
- ___ 53. Click **View Record List**.

Exercise 7-15: Running license audit reports

In this exercise, you run license audit reports for PVU and install-based licenses. A discovery and IBM Tivoli Integration Composer migration must occur before the license audit reports can gather the actual data.

- ___ 1. Verify that you are in the License application. If not, click **Assets > Licenses** in the navigation bar.
- ___ 2. Clear any filters and press Enter in the License field to display all the licenses.
- ___ 3. Click **Run Reports** under More Actions in the navigation bar.
- ___ 4. Find and click the **Install Based Audit** report.
- ___ 5. Click **Submit**.
- ___ 6. Review the Install Based Audit report. This report displays results for all licenses with a capacity unit of installed instance (INSTINST). The report compares the capacity in the licenses to the discovered instances in deployed software. It does not use the allocation count. Allocation is an administrative feature for keeping track of where you authorize the use of the software.
- ___ 7. Notice that there is a negative variance for the Symantec Norton AntiVirus Corporate Edition software product. The software asset manager must investigate the reason for this under licensed situation.

The screenshot shows a report titled 'Install Based Audit Report' from 'Tivoli software'. The report header includes the IBM logo. The main table has columns for Customer, Associated Product, Version, Release, Total License Capacity, Discovered Capacity, and Variance. The data shows three products: Adobe Acrobat, Microsoft SQL Server 7 Standard Edition, and Symantec Norton AntiVirus Corporate Edition. The last row for Symantec Norton AntiVirus Corporate Edition has a circled red variance value of -1, indicating a negative variance. The report also shows a total of 3 products and was generated on 9/1/12 at 04:23:24.

| Customer: | Associated Product | Version | Release | Total License Capacity | Discovered Capacity | Variance |
|-----------|---|---------|---------|------------------------|---------------------|----------|
| | Adobe Acrobat | | | 5 | 5 | 0 |
| | Microsoft SQL Server 7 Standard Edition | | | 3 | 2 | 1 |
| | Symantec Norton AntiVirus Corporate Edition | | | 14 | 15 | -1 |

- ___ 8. Optionally, click the hyperlinks in the report to view the subreports.
- ___ 9. Close all open report windows.

- ___ 10. Find and click the **PVU Based Audit** report.
- ___ 11. Click **Submit**.
- ___ 12. Review the PVU Based Audit report. This report displays results for all licenses with a capacity unit of PVU (VALUNIT). The report compares the capacity in the licenses to the discovered instances in deployed software. It does not use the allocation count. Allocation is an administrative feature for tracking where you authorize the use of the software.
- ___ 13. Notice that there are several negative variances. Therefore, this customer is in an underlicensed situation.
- ___ 14. Optionally, click the hyperlinks in the report to view the subreports.
- ___ 15. Close all open report windows.
- ___ 16. Find and click **License Details**.
- ___ 17. Click **Submit**.
- ___ 18. Review the license details report.
- ___ 19. Close the displayed report windows.
- ___ 20. Click **Cancel** in the Reports window.
- ___ 21. Sign out of the console.

Exercise 7-16: Removing a software license when retiring an asset

When retiring an asset, it is important to release any software allocations so that they can be reused. This exercise demonstrates how to remove a software license when you retire an asset.

- ___ 1. Log in to the console as **Jake** with the password **object00**.
- ___ 2. Click **Assets > Assets** in the navigation bar.
- ___ 3. Find and open **ITAM3004**.

- ___ 4. Click **Manage Software License Allocations** under More Action in the navigation bar.
- ___ 5. Review the allocation capacity. Both licenses have a capacity of **200**.
- ___ 6. Select both licenses and click **Remove**.

| Allocations | License | Software Product | Capacity | Capacity Unit |
|-------------------------------------|-------------|---|----------|---------------|
| <input checked="" type="checkbox"/> | ITAM1009 >> | IBM DB2 Workgroup Server Edition CPU Option | 200.00 | VALUNITS |
| <input checked="" type="checkbox"/> | 1004 >> | IBM WebSphere Portal Server | 200.00 | VALUNITS |

Remove **Cancel**

- ___ 7. Click **OK** to dismiss the system message.
- ___ 8. Click the **Change Status** icon and set the status to **Disposed**.
- ___ 9. Click **Go To Applications > Assets > Licenses**.
- ___ 10. Find and open the **ITAM1009** license.
- ___ 11. Scroll to the **Scope** section. Verify that the allocated capacity is zero (0). It was 200 when you initially allocated the license.
- ___ 12. Scroll to the **Allocations** section.
- ___ 13. Click the **Computer Asset** subtab. Notice the computer asset that you removed the allocation for is no longer listed.
- ___ 14. Click **View Record List**.

- ___ 15. Find and open the **WebSphere Portal Server** license.
- ___ 16. Scroll to the **Scope** section. Verify that the allocated capacity is 400. It was 600 when you allocated the license to the three assets.
- ___ 17. Scroll to the **Allocations** section.
- ___ 18. Click the **Computer Asset** subtab. Notice that the ITAM3004 computer asset is no longer listed. The other two assets are listed.

| Computer Asset | Description | Primary Customer | Capacity |
|----------------|---------------------|------------------|----------|
| ITAM3005 | Lenovo Thinkpad T60 | | 200.00 |
| ITAM3006 | Lenovo Thinkpad T60 | | 200.00 |

Exercise 7-17: Swapping licenses when swapping assets

This exercise demonstrates how to swap licenses when you swap assets.

- ___ 1. Click **Go To Applications > Assets > Assets**.
- ___ 2. Find and open **ITAM3005**.
- ___ 3. Click **Swap Assets** under Common Actions in the navigation bar.
- ___ 4. Enter **SOUTHERN** in the To Location and **ITAM3008** in the Replacing Asset.

| Asset | Description | Parent | Location | To Location | Replacing Asset |
|----------|---------------------|--------|----------|-------------|-----------------|
| ITAM3005 | Lenovo Thinkpad T60 | | SOUTHERN | SOUTHERN | ITAM3008 |

| License Name | Software Product | Capacity | Capacity Unit | Transfer? | Remove? |
|--------------|-----------------------------|----------|---------------|-------------------------------------|--------------------------|
| 1004 | IBM WebSphere Portal Server | 800 | VALUNITS | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

- ___ 5. Keep the **Transfer** option selected in the Manage Software License Allocations section and click **OK**.
- ___ 6. Click **OK** to dismiss the system message.
- ___ 7. Click **Go To Applications > Assets > Licenses**.
- ___ 8. Find and open the **WebSphere Portal Server** license.
- ___ 9. Scroll to the **Allocations** section.
- ___ 10. Click the **Computer Asset** subtab. Notice that the ITAM3005 computer asset is no longer listed. However, the ITAM3008 asset is listed.

The screenshot shows a software interface titled 'Allocations'. At the top, there are tabs: Locations, Computer Assets (which is selected), Partition Assets, Application Users, and GL Accounts. Below the tabs is a toolbar with icons for Filter, Sort, and Download. The main area is a table titled 'Computer Assets' with the following data:

| Computer Asset | Description | Primary Customer | Capacity | Action |
|----------------|---------------------|------------------|----------|--------|
| ITAM3008 | Lenovo Thinkpad T60 | | 200.00 | |
| ITAM3006 | Lenovo Thinkpad T60 | | 200.00 | |

At the bottom of the table are two buttons: 'Select Computer Assets' and 'New Row'.

- ___ 11. Sign out of the console.
- ___ 12. Tell your instructor that you are finished with the unit exercises.

Student exercises for Unit 8

The exercises in this unit cover the basic use of IBM Tivoli Asset Discovery for Distributed and Software Knowledge Base Toolkit. You learn how to navigate the console, manage software inventory, and sign PVU reports in IBM Tivoli Asset Discovery for Distributed. In the Software Knowledge Base Toolkit, you learn how to add software items and signatures.

The manage software inventory concepts covered in this course are also covered in the *IBM License Metric Tool 7.5 (SPVC)* course. This course is a no-charge offering. The concepts are repeated because it is critical that you understand these concepts to ensure that the discovery data uploaded to IBM SmartCloud Control Desk is accurate. These exercises do not cover infrastructure administration tasks in IBM Tivoli Asset Discovery for Distributed. Administration tasks are covered in the *IBM License Metric Tool 7.5 (SPVC)* course.



Note: If the host computer that you are using does not have enough memory to run both the IBM SmartCloud Control Desk and IBM Tivoli Asset Discovery for Distributed images, you can shut down the IBM SmartCloud Control Desk image.

Exercise 8-1: Logging in to the IBM Tivoli Asset Discovery for Distributed image

The exercises in this unit use the IBM Tivoli Asset Discovery for Distributed image. You must start that image to complete the exercises. This unit demonstrates how to start the image and log in.

- ___ 1. If your system does not have 12 GB of RAM or more, shut down the **IBM Tivoli SmartCloud Control Desk** image.
- ___ 2. Start the **IBM Tivoli Asset Discovery for Distributed** image.
- ___ 3. At the Windows login screen, press Ctrl+Alt+Delete.



Note: A different key sequence or menu selection might be used, depending on your environment. For example, when running a virtual machine on a Windows host, you might press Ctrl+Alt+Insert to access the login screen on the virtual machine.

- ___ 4. Enter the user name **Administrator** and password **object00**.
- ___ 5. Click **OK** to log in to Windows 2003.

Exercise 8-2: Verifying the image network configuration

The image for this course is designed to use the static IP address of **192.168.1.200** with the host name **vm100.tivoli.edu**. Changing the IP address or host name can cause the software not to operate properly. In this exercise, you verify the network configuration of the system that you are using.

___ 1. Double-click the command prompt icon on the desktop.

___ 2. Type the following command:

```
ping vm100.tivoli.edu
```

___ 3. Verify that the fully qualified host name can be resolved. It is successful when you receive a reply.

___ 4. Repeat the test with the following commands. All commands must receive a reply.

```
ping vm100  
ping 192.168.1.200
```



Note: If you do not receive a reply, your operating system is not configured correctly, either by a misconfigured network card or IP stack. Correct the virtual machine configuration. If you are using this system in a classroom or supported lab environment, contact your instructor or lab support personnel.

___ 5. Close the command prompt.

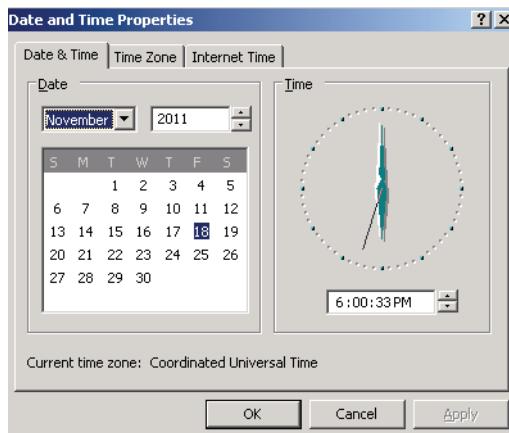
Exercise 8-3: Starting IBM Tivoli Asset Discovery for Distributed

This image uses special time settings in the **.vmx** file to preserve a date and time change that you make in this exercise. You run a script to change the date to November 18, 2011. On subsequent restarts, the settings keep time relative to November 18, 2011. Because the IBM Tivoli Asset Discovery for Distributed calculations and operations are time-dependent, the images can simulate a real environment by using demonstration data that was exported in November 2011. This exercise demonstrates how to set the time and start the IBM Tivoli Asset Discovery for Distributed server.

___ 1. Double-click the **Image Set Time** shortcut on the desktop.

___ 2. Double-click the clock in the Taskbar Notification area.

- ___ 3. Verify that the date is November 18, 2011, and that the time is close to the values that are displayed in the following screen capture.



Note: Sample data that was exported on November 18, 2011 is used in this class. If the system date is more than 360 days after November 18, 2011, the agents in the sample data are removed from the database because they are considered inactive. Setting the date to November 18, 2011 ensures that the data is retained for the entire class. If you shut down the image, the elapsed time is still calculated from November 18, 2011. For example, if you spend four days completing a task, the image date is in the range of November 18 to November 22, 2011, on the last day of your task.

- ___ 4. Close the **Clock** application.
- ___ 5. Double-click the **Start Tivoli Asset Discovery for Distributed** shortcut on the desktop.
- ___ 6. Wait for the script to run.
- ___ 7. Press Enter to close the command prompt.
- ___ 8. Open **Services** (**Start > Administration Tools > Services**).
- ___ 9. Verify that the following services are started:
- **DB2 - DB2COPY1 - DB2-0**
 - **IBM License Metric Tool and Tivoli Asset Discovery for Distributed Agent**
 - **Tivoli Integrated Portal - V2.2_TIPProfile_Port_16310**
- ___ 10. Close **Services**.

Exercise 8-4: Viewing agents

For accurate reporting, you must install agents on all computers that run the software that you want to manage. After installing the agents, an Inventory Administrator must monitor the connection and

reporting status of the agents. When an agent fails to upload scan data at the scheduled interval, you must investigate the cause. A failure to upload data can impact the accuracy of the reports. This exercise demonstrates how to review the agent data.



Note: Administration of the IBM Tivoli Asset Discovery for Distributed infrastructure is covered in the *IBM License Metric Tool 7.5 (SPVC)* course.

- ___ 1. Double-click the shortcut for **Firefox** on the desktop to open the browser.
- ___ 2. Select the bookmark **IBM Tivoli Asset Discovery for Distributed Console**.



Note: If you receive an error when accessing the console, wait a few minutes for the server to finish starting.

- ___ 3. Log in as **tipadmin** with the password **object00**.
- ___ 4. Review the home page.

The Software Product Status section provides quick links to recent audit reports and common tasks. The Infrastructure Health section provides a status of the monitoring infrastructure and collected software data to help administrators and software asset managers manage the environment.

Software Product Status

Recent Audit Reports

The table below shows reports that cover the three most recent periods.

| Status | Reporting Period |
|--------|-----------------------------|
| Ready | Oct 18, 2011 - Nov 15, 2011 |
| Ready | Oct 18, 2011 - Nov 8, 2011 |
| Ready | Oct 18, 2011 - Nov 1, 2011 |

Software Bundle Management

Unconfirmed products: 556 (23.8%)

Number of unconfirmed instances: 2,281

Related tasks:

[View reports](#) [Manage Software Inventory](#)

Infrastructure Health

Agent Status

Agents with problems: 2 (0.7%)

Software Scans

Software scan failed: 0 (0%)

Infrastructure Coverage

Unmonitored systems: 0 (0%)

Related tasks:

[Agents](#) [Scan groups](#) [Systems without agents](#)
[VM managers](#) [Manage notifications](#) [Shared file systems](#)

- ___ 5. Click **Tivoli Asset Discovery > Infrastructure > Agents**. You can also click the **Agents** link under Related tasks in the Home page Infrastructure Health section.

- ___ 6. Review the agent list.

There are 302 agents listed, including an agent for your class image. The **vm100** agent is a locally installed agent. You can filter the agent status. If you have thousands of agents, filtering is a good way to find the status of different agents.

- ___ 7. Review the status column.

The **vm100** agent is in an **Incomplete** status. The incomplete status indicates that hardware information is missing. This condition occurs when an agent is installed in a virtual environment and a VM manager or Common Inventory Technology enabler was not configured.

| Select | Status | Version | Network Address | Server ID |
|--------------------------|-------------------------|---------|-----------------|---|
| <input type="checkbox"/> | OK | 7.5 | Agent187 | TAG 94 |
| <input type="checkbox"/> | Incomplete | 7.5.0.0 | VM100 | ⚠️ TLM_VM_Vmware-56 4d df a6 40 4d 97 a6-f7 17 a2 0c ee 8d 47 75 |
| <input type="checkbox"/> | Failed | 7.5.0.0 | nc043025 | |
| <input type="checkbox"/> | OK | 7.5 | Agent1 | TAG 1 |
| <input type="checkbox"/> | OK | 7.5 | Agent2 | TAG 1 |
| <input type="checkbox"/> | OK | 7.5 | Agent3 | TAG 2 |
| <input type="checkbox"/> | OK | 7.5 | Agent4 | TAG 2 |
| <input type="checkbox"/> | OK | 7.5 | Agent5 | TAG 3 |

- ___ 8. Click the link for the **nc043025** agent to open the agent details.

- ___ 9. Review the Agent Details. Notice that this agent is in a failed state.

- ___ 10. Click the **Agent Problems** tab.

- ___ 11. Review the problem description. In a production environment, the Inventory Administrator troubleshoots this problem.

- ___ 12. Close the **Agents** tab after you review the agents.

Exercise 8-5: Viewing hardware processor information

Hardware processor information is collected from the virtualization scans. It is used to calculate PVU data for PVU audit reports. It is also used to identify system model, partition cores, and server cores that are used in IBM systems audit reports. This exercise demonstrates how to review discovered processor information.

- ___ 1. Click **Tivoli Asset Discovery > Hardware > Processors**.
- ___ 2. Review the data and note the PVU values that are assigned. These values are based on the number of partition cores for subcapacity and server cores for full capacity.

- ___ 3. Click the header for **Default PVU Value** column twice to sort the column in descending order.

The screenshot shows a table titled "Processors" under the "Processors in your Infrastructure" tab. The table lists various processor models with their details like Vendor, Brand, Type, Model, System Model, PVU per Core, Default PVU Value, Partition Cores, and Partition Network. Two cells in the "Default PVU Value" column are circled in red, showing the value "Yes". The table has a header row with sorting icons and a footer with pagination information.

| Vendor | Brand | Type | Model | System Model | PVU per Core | Default PVU Value | Partition Cores | Partition Network |
|----------|------------------------------------|--------------|-------------------------|--------------|--------------|-------------------|-----------------|-------------------|
| IBM | CP | Single-core | | 8236-E8C | 100 | Yes | 6 | Agent237 |
| IBM | CP | Single-core | | 8236-E8C | 100 | Yes | 12 | Agent238 |
| Intel(R) | Xeon(R), More than 4 | Multi-core | 6500-6599 or 7500-7599 | 7037-A50 | 120 | No | 6 | Agent207 |
| Intel(R) | Xeon(R), 1 or 2 Socke | Multi-core | E3-12xx, E7-28xx, E7-4E | 7047-185 | 70 | No | 6 | Agent127 |
| IBM(R) | POWER6 (550,560,57) | Dual-core | All Existing | 7047-185 | 120 | No | 6 | Agent159 |
| Intel(R) | Xeon(R) or Pentium(R); Single-core | All Existing | | 7047-185 | 100 | No | 6 | Agent197 |
| Intel(R) | Xeon(R), 1 or 2 Socke | Multi-core | E3-12xx, E7-28xx, E7-4E | 7778-23x | 70 | No | 6 | Agent233 |
| IBM(R) | POWER6 (520,JS12, J) | Dual-core | All Existing | 7778-23x | 80 | No | 6 | Agent281 |
| IBM(R) | POWER7 (750,755,7) | Multi-core | All Existing | 7778-23x | 100 | No | 6 | Agent77 |
| Intel(R) | Xeon(R) | Multi-core | 3400-3699 or 5500-5699 | 7891-71X | 70 | No | 6 | Agent165 |
| Intel(R) | Xeon(R) | Multi-core | 3400-3699 or 5500-5699 | 7891-71X | 70 | No | 6 | Agent219 |
| Intel(R) | Xeon(R) | Multi-core | 3400-3699 or 5500-5699 | 7891-71X | 70 | No | 6 | Agent249 |

If the Default PVU Value is Yes, one of the following conditions exist:

- The processor type was not found in the PVU table.
- The agent did not gather the data from the VM Manager or Common Inventory Technology enabler to properly identify it.

A default value of 100 PVUs is applied. You can search this field if you find the PVU numbers in the PVU audit reports are not as expected. You can search all **Default PVU Value =Yes** and determine the correct value.

It is also possible for the partitions to have more cores than the server. This situation can happen if hyperthreading is enabled. Hyperthreading multiplies the cores and makes logical cores available. In this situation, you are charged for only the lesser of the two values. On Power Systems, for example, you can enable Micro-Partitioning and create virtual processors that are fractions of the real processors.

- ___ 4. Close the Processor tab.

Exercise 8-6: Viewing and reading PVU reports

A PVU report provides information about processor value unit products for a specific period. IBM customers can choose between two PVU pricing models: full capacity and subcapacity. Customers using full capacity pay for all active processors in the physical environment. Customers using subcapacity can save money by paying only for the processor count that is assigned to the virtual

environment where the software is running. Customers using subcapacity pricing are required by the licensing contract to generate and sign audit reports at least every three months. These audit reports must be stored for auditing purposes. This exercise demonstrates how to view PVU reports.

1. Click Tivoli Asset Discovery > IBM Audit Reports > View Reports.

When you first install IBM Tivoli Asset Discovery for Distributed, no reports are available. However, in the provided demonstration data, several reports were generated and are ready to sign. The bottom of the window shows the reporting period that the next scheduled report covers.



Note: If the reports are in a running state, wait a few minutes for the reports to regenerate. Processes periodically run that can cause the server to recalculate PVU values and regenerate the reports. Refresh the browser until they are all in a ready state.

2. Click the Ready link for the report with an End date of Nov 8, 2011.

3. Review the Audit Report Summary.

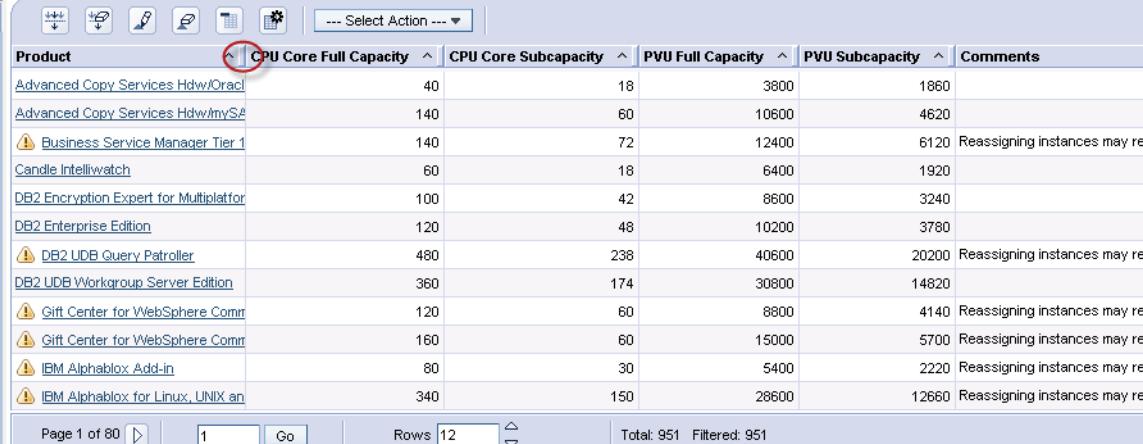
There are three links in the summary section.

The **sign it** link is used to sign the report after you verify the PVU data. This task is covered in Exercise 8-15, “Signing the reports” on page 8-29. The **Manage Software Inventory** link takes you to Manage Software Inventory where you can manage unconfirmed instances. This task is covered in Exercise 8-9, “Filtering Manage Software Inventory” on page 8-14 through Exercise 8-14, “Resolving PVU discrepancies” on page 8-26. You can use the **download the CSV file** link to download a comma-separated values file that details missing software scans. You can use this link to view the software scan history for the report. This information can be used to identify agents that have not reported their software inventory on schedule. The file shows the following information:

- Software scan scheduled date
- Scan group name
- Failed agent host name
- Failed agent scan date (the column is empty when the scan results are not sent to the server. If the results are sent, but there are still problems, the column lists the scan date when the scan results are sent.)
- Failed agent error status (this column lists the software scan-related problems and general connection problems for the agent).

- ___ 4. Review the PVU values in the report. You might have to resize the **Product** column width to see the **Capacity** columns. To change the width, place your cursor between the column headers and drag the cursor to the left or right.

PVU Report PVU table version: Nov 16, 2011



| Product | CPU Core Full Capacity | CPU Core Subcapacity | PVU Full Capacity | PVU Subcapacity | Comments |
|---|------------------------|----------------------|-------------------|-----------------|-------------------------------|
| Advanced Copy Services Hdw/Oracle | 40 | 18 | 3800 | 1860 | |
| Advanced Copy Services Hdw/MySAP | 140 | 60 | 10600 | 4620 | |
| ⚠ Business Service Manager Tier 1 | 140 | 72 | 12400 | 6120 | Reassigning instances may red |
| Candle Intelliwatch | 60 | 18 | 6400 | 1920 | |
| DB2 Encryption Expert for Multiplatform | 100 | 42 | 8600 | 3240 | |
| DB2 Enterprise Edition | 120 | 48 | 10200 | 3780 | |
| ⚠ DB2 UDB Query Patroller | 480 | 238 | 40600 | 20200 | Reassigning instances may red |
| DB2 UDB Workgroup Server Edition | 360 | 174 | 30800 | 14820 | |
| ⚠ Gift Center for WebSphere Commr | 120 | 60 | 8800 | 4140 | Reassigning instances may red |
| ⚠ Gift Center for WebSphere Commr | 160 | 60 | 15000 | 5700 | Reassigning instances may red |
| ⚠ IBM Alphablox Add-in | 80 | 30 | 5400 | 2220 | Reassigning instances may red |
| ⚠ IBM Alphablox for Linux, UNIX and Windows | 340 | 150 | 28600 | 12660 | Reassigning instances may red |

Page 1 of 80 | 1 Go | Rows 12 | Total: 951 Filtered: 951

Download summary as: PDF CSV

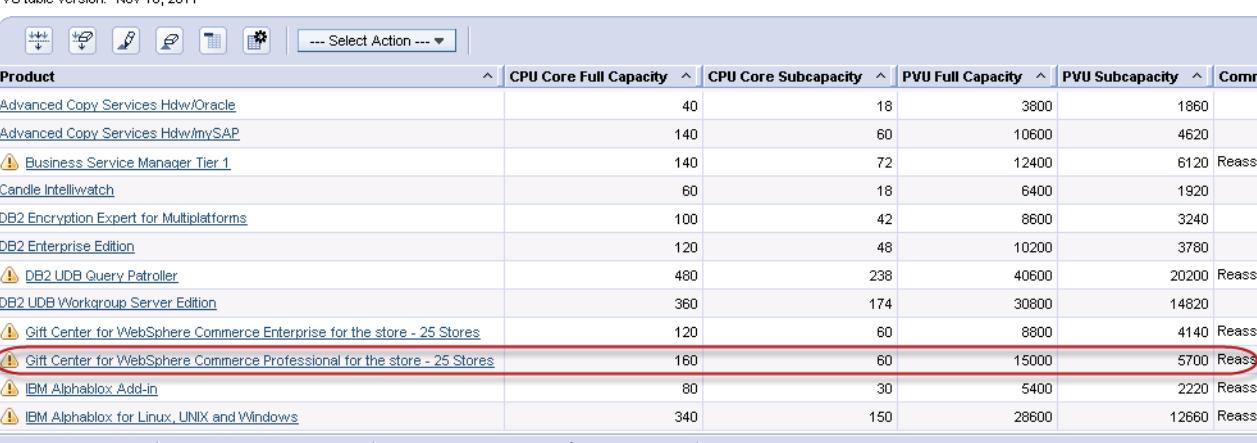


Note: In version 7.2.2, the Systems Report was added to the reports view. You can click the PVU Report and Systems Report tabs to switch between the different audit reports. Systems reports are not covered in this course. You can learn more about systems reporting in the *IBM Tivoli License Metric Tool 7.5 (SPVC)* course.

Before signing an audit report, you must validate the information in the report. To properly analyze the reports, you must understand how to read the results.

- ___ 5. Find the **Gift Center for WebSphere Commerce Professional for the store - 25 Stores** entry.

PVU table version: Nov 16, 2011



| Product | CPU Core Full Capacity | CPU Core Subcapacity | PVU Full Capacity | PVU Subcapacity | Comments |
|---|------------------------|----------------------|-------------------|-----------------|----------|
| Advanced Copy Services Hdw/Oracle | 40 | 18 | 3800 | 1860 | |
| Advanced Copy Services Hdw/MySAP | 140 | 60 | 10600 | 4620 | |
| ⚠ Business Service Manager Tier 1 | 140 | 72 | 12400 | 6120 | Reassi |
| Candle Intelliwatch | 60 | 18 | 6400 | 1920 | |
| DB2 Encryption Expert for Multiplatforms | 100 | 42 | 8600 | 3240 | |
| DB2 Enterprise Edition | 120 | 48 | 10200 | 3780 | |
| ⚠ DB2 UDB Query Patroller | 480 | 238 | 40600 | 20200 | Reassi |
| DB2 UDB Workgroup Server Edition | 360 | 174 | 30800 | 14820 | |
| ⚠ Gift Center for WebSphere Commerce Enterprise for the store - 25 Stores | 120 | 60 | 8800 | 4140 | Reassi |
| ⚠ Gift Center for WebSphere Commerce Professional for the store - 25 Stores | 160 | 60 | 15000 | 5700 | Reassi |
| ⚠ IBM Alphablox Add-in | 80 | 30 | 5400 | 2220 | Reassi |
| ⚠ IBM Alphablox for Linux, UNIX and Windows | 340 | 150 | 28600 | 12660 | Reassi |

Page 1 of 80 | 1 Go | Rows 12 | Total: 951 Filtered: 951

- ___ 6. Use the following example Passport Advantage entitlement list to compare what was purchased to what was discovered. Make the assumption that you have agreed to the virtualization (subcapacity) pricing.

| PID | Part Number | Description | PVU |
|---------|-------------|--|-------|
| 5724Y62 | E07D4LL | IBM WEBSPHERE ASSET INVENTORY MANAGEMENT SERVICES FOR WEBSPHERE SENSOR E | 3300 |
| 5724I38 | D5TP4LL | IBM GIFT CENTER FOR WEBSPHERE COMMERCE ENTERPRISE FOR THE STORE - 25 STORES | 4140 |
| 5724I40 | E02G1LL | IBM GIFT CENTER FOR WEBSPHERE COMMERCE PROFESSIONAL FOR THE STORE - 25 STORES | 4860 |
| 5724L14 | E01ZTLL | IBM DB2 ALPHABLOX FOR LINUX, UNIX AND WINDOWS PROCESSOR VALUE UNIT (PVU) ANNUAL | 28600 |
| 5724E12 | E0200LL | IBM APPLICATION WORKLOAD MODELER FOR LINUX ON ZSERIES PROCESSOR VALUE UNIT (PVU) | 6800 |
| 5724I40 | D55W0LL | IBM WEBSPHERE COMMERCE PROFESSIONAL PROCESSOR VALUE UNIT (PVU) LICENSE + SW SUBSCRIPTION | 12540 |
| 5724U91 | E04S5LL | IBM BUSINESS PROCESS ACCELERATOR PROCESSOR VALUE UNIT (PVU) ANNUAL SW SUBSCRIPTION | 5500 |
| 5724U92 | E04S6LL | IBM BUSINESS PROCESS ACCELERATOR AND WEBSPHERE PORTAL SERVER PROCESSOR VALUE UNIT (PVU) | 6500 |
| 5725C94 | D01LDLL | IBM PROCESS CENTER ADVANCED PROCESSOR VALUE UNIT (PVU) LICENSE + SW SUBSCRIPTION | 4000 |
| 5725C96 | D01M2LL | IBM PROCESS CENTER EXPRESS PROCESSOR VALUE UNIT (PVU) LICENSE + SW SUBSCRIPTION | 1000 |
| 5725C95 | D01M6LL | IBM PROCESS CENTER STANDARD PROCESSOR VALUE UNIT (PVU) LICENSE + SW SUBSCRIPTION | 2700 |
| 5724I81 | D55KZLL | IBM CICS TRANSACTION GATEWAY PROCESSOR VALUE UNIT (PVU) LICENSE + SW SUBSCRIPTION | 20000 |
| 5724Y70 | D0AMILL | IBM TIVOLI CLOUDBURST ADDITIONAL UNIT PROCESSOR VALUE UNIT (PVU) SW SUBSCRIPTION | 4000 |
| 5724W95 | E063ELL | COGNOS 8 FIN PERF AP ANALYTICS PVU ANNUAL SW S&S RNWL | 16000 |
| 5724W95 | E063DLL | COGNOS 8 FIN PERF AR ANALYTICS PVU ANNUAL SW S&S RNWL | 18000 |

In this example, your Passport Advantage entitlements are 4850, whereas your PVU report is 5700. You must investigate this information to understand why these values differ. You perform this comparison in Exercise 8-14, “Resolving PVU discrepancies” on page 8-26.

- ___ 7. Click the **Gift Center for WebSphere Commerce Professional for the store - 25 Stores** product link in the report.

The server IDs where components related to Gift Center for WebSphere Commerce Professional for the store - 25 Stores were discovered are displayed.

You must review these servers to determine whether the processor cores were identified correctly. Perhaps they are backup servers that can be excluded from PVU calculations or incorrectly bundled instances. You should review this information with your application administrators to identify why these instances are used. You manage instance classification and software bundling in Manage Software Inventory.

- ___ 8. Click the **PID and Part Number Information** link.

A list of the PIDs and part numbers are displayed for the product.

The icon next to the **E02G1LL** part number indicates that this part number was imported. That part number was imported as part of the demonstration data. Part numbers of software products can be imported under **Tivoli Asset Discovery > Administration > Import Part Numbers**. This process is covered in the *IBM Tivoli License Metric Tool 7.5 (SPVC)* course. If you look at the example Passport Advantage entitlement list in Step 6, you see that part number is a purchased part number.

- ___ 9. Click the reporting period in the breadcrumbs to return to the report.

The screenshot shows a web-based reporting interface. At the top, there's a breadcrumb navigation bar with the text "View Reports", "Audit Reports", "Oct 18, 2011 - Nov 8, 2011", "Servers", and "PID and Part Number Information". Below this, a section titled "PID and Part Number Information" is displayed. A note states: "The table shows the list of part numbers of the chosen product, together with their description." Underneath, it says "Product: Gift Center for WebSphere Commerce Professional for the store - 25 Stores".

- ___ 10. Scroll to the bottom of the report.
- ___ 11. Click the **PDF** link next to **Download summary as**.
- ___ 12. Select **Open with Adobe Reader 9.3** and **OK**. It takes a minute for the report to load. If you are prompted with an Adobe Acrobat Reader license agreement, accept it to continue.
The status of the report is **Ready**. To provide a softcopy for an audit, the report must have a status of **Signed**. You sign the report in Exercise 8-15, “Signing the reports” on page 8-29.
- ___ 13. Close the audit report **.pdf** file.
- ___ 14. Close the **View Reports** tab.

Exercise 8-7: Viewing software inventory data

IBM Tivoli Asset Discovery for Distributed agents discover software at the component level. The discovery results are uploaded to the server per the software scan schedule. After the scan data is uploaded, a server process called **inventoryBuilder** must run to build the software inventory. By default, the inventoryBuilder process runs every five hours. The frequency is controlled by the **productInventoryBuilderPeriod** server parameter.

During the inventoryBuilder process, the IBM Tivoli Asset Discovery for Distributed server evaluates the components to determine which software product to assign them to. The server uses information in the software catalog and software bundling rules to determine the association. Unfortunately, because of the complexity of software bundling, the association that is established by the server is not always correct. Therefore, the software inventory must be verified to ensure that the correct assignment was made. The accuracy of PVU audit reports depends on the correct assignment. This exercise demonstrates how to review software inventory.

- ___ 1. Click **Tivoli Asset Discovery > Software > Manage Software Inventory**.
- ___ 2. If prompted with the Welcome to the Manage Software Inventory panel, select **Never Show Again** and click **OK**.
- ___ 3. Review the filtered software product list.

The software product list is a filtered list of all discovered software products.

The default filter in Tivoli Asset Discovery for Distributed is **All products**. However, you can change the filter to show PVU products or Systems products. This list differs from the IBM PVU audit report, which has only PVU-eligible products and is release-independent and version-independent. The software product list provides you with a much more granular view of your software inventory. Each discovered component is given a confidence rating. This rating indicates the degree of confidence that the component belongs to the product to which it is assigned. The confidence ratings of the components are rolled up to the release and product levels.

- ___ 4. Find and expand the **Business Service Manager Tier 1** link in the Product/Release/Component column.

A list of discovered releases and the number of instances is displayed.

| Product/Release/Component | Confidence | Part Numbers | Manufacturer |
|--|------------|--------------|--------------|
| BP Telelogic Rhapsody | 100% | | IBM |
| BP Telelogic System Arch | 100% | | IBM |
| Backup Recovery and Media Services for iSeries | 100% | | IBM |
| Business Graphics Utility for i5/OS | 100% | | IBM |
| Business Service Manager Tier 1 | 79% | | IBM |
| Business Service Manager Tier 1 4.1 (6) | 88% | | |
| Business Service Manager Tier 1 4.2 (1) | 28% | | |
| CCA Cryptographic Service Provider | 100% | | IBM |
| COGNOS POWERPLAY | 100% | | IBM |

5. Expand the **Business Service Manager Tier 1 4.1** link in the Product/Release/Component column.

A list of discovered instances is displayed.

| Product/Release/Component | Host Name | Confidence | Explanation of Confidence |
|--|-----------|------------|--------------------------------------|
| Business Graphics Utility for i5/OS | | 100% | |
| Business Service Manager Tier 1 | | 79% | |
| Business Service Manager Tier 1 4.1 (6) | | 88% | |
| Business Service Manager Tier 1 (SP) 4.1 | Agent2 | 100% | No other bundling options available. |
| Business Service Manager Tier 1 (SP) 4.1 | Agent297 | 100% | No other bundling options available. |
| Business Service Manager Tier 1 (SP) 4.1 | Agent246 | 100% | No other bundling options available. |
| Business Service Manager Tier 1 (SP) 4.1 | Agent198 | 100% | No other bundling options available. |

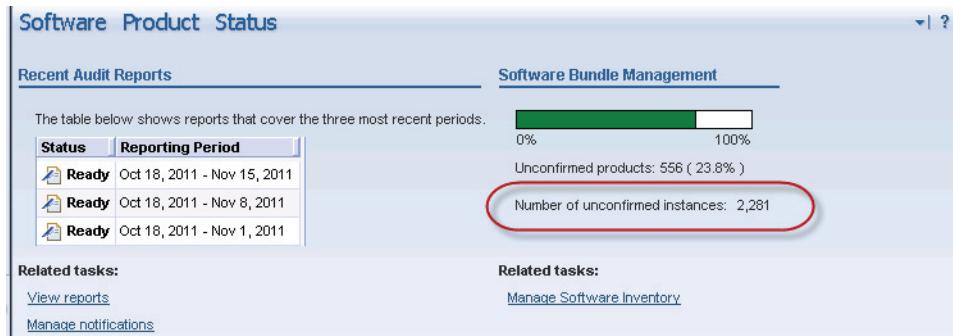
6. Close the **Manage Software Inventory** tab.

Exercise 8-8: Viewing unconfirmed instance alerts

There are three ways to view unconfirmed instance alerts. An overall status of unconfirmed instances can be found on the Home page. You can also see unconfirmed instance alerts in ready audit reports. Lastly, unconfirmed instances can be viewed in Manage Software Inventory. Any

instance with a confidence level of less than 100% is unconfirmed. This exercise demonstrates the different ways to view unconfirmed instances.

- ___ 1. Verify that you are viewing the Home page. If not, click **Tivoli Asset Discovery > Home**.
- ___ 2. Review the number of unconfirmed instances under Software Bundle Management.



- ___ 3. Click the **View Reports** link on the Home page.
- ___ 4. Click the **Ready** link for the report with an End date of **Nov 8, 2011**.
- ___ 5. Place your cursor over the **Business Service Manager Tier 1** link.

The screenshot shows the 'PVU Report' section. It has a table titled 'PVU table version: Nov 16, 2011'. The columns are 'Product', 'CPU Core Full Capacity', and 'CPU Core Subcap'. The table contains several rows, including 'Advanced Copy Services Hdw/Oracle' (40), 'Advanced Copy Services Hdw/mySAP' (140), 'Business Service Manager Tier 1' (140), 'Candle Intelliwatch' (120), 'DB2 Encryption Expert for Multi' (480), and 'DB2 UDB Query Patrol' (360). A tooltip appears over the 'Business Service Manager Tier 1' row: 'This product contains some unconfirmed instances. Go to the Manage Software Inventory panel where you can confirm or assign instances.'

A message is displayed indicating that there are unconfirmed instances for this product.

Reassigning instances can affect the PVU calculations. Instances are managed under Manage Software Inventory. Notice that there is a link to Manage Software Inventory in the Audit Report Summary section. Managing software inventory is covered in exercises Exercise 8-9, “Filtering Manage Software Inventory” on page 8-14 through Exercise 8-14, “Resolving PVU discrepancies” on page 8-26. All instances must be confirmed before you sign the report.

- ___ 6. Close the **View Reports** tab.
- ___ 7. Click the **Manage Software Inventory** link on the Home page.

- _____ 8. Find and place your cursor over the confidence level for the **Business Service Manager Tier 1** product.

The screenshot shows a software catalog interface with a table of products. The columns are 'Product/Release/Component', 'Confidence' (represented by a green progress bar), 'Part Numbers', and 'Manufacturer'. The 'Confidence' column includes a tooltip: 'The average confidence level of all currently assigned instances. Check if there are other instances to be assigned.' The 'Business Service Manager Tier 1' row has a confidence level of 79%.

| Product/Release/Component | Confidence | Part Numbers | Manufacturer |
|--|------------|--------------|--------------|
| BP Telelogic System Arch | 100% | | IBM |
| Backup Recovery and Media Services for iSeries | 100% | | IBM |
| Business Graphics Utility for i5/OS | 100% | | IBM |
| Business Service Manager Tier 1 | 79% | | IBM |
| CCA Cryptographic Service Provider | 100% | | IBM |
| COGNOS POWERPLAY | 100% | | IBM |
| Candle Intelliwatch | 100% | | IBM |
| Capacity Manager Agent | 100% | | IBM |
| DB2 Encryption Expert for Multiplatforms | 100% | | IBM |

The message tells you to check the assignment of instances under this product because there is a question whether they are properly assigned.

- _____ 9. Expand **Business Service Manager Tier 1**.

Two product releases are listed.

Because the confidence level for both releases is less than 100%, you can tell that they both include unconfirmed instances. Also, the number in parentheses next to each release indicates the number of instances assigned to that product release. Therefore, when you expand the **Business Service Manager Tier 1 4.1** release, you see six instances. When you expand the **Business Service Manager Tier 1 4.2** release, you see only one instance.

- _____ 10. Expand **Business Service Manager Tier 1 4.2**.

A list of instances assigned to that release is displayed.

The Explanation of Confidence column has information about how the confidence level was determined for each discovered instance.

The confidence level is assigned when the automatic bundling rules run. A rule-based scoring system is used. The closer the normalized score is to 100%, the higher the confidence in the bundling assignment. Any confidence less than 100% indicates that there are other possible assignments. Therefore, you must confirm that the bundling rules made the correct assignment or reassign the instance to the correct product. IBM Tivoli Asset Discovery for Distributed uses the software hierarchy and relationships in the software catalog to determine the possible assignments. To ensure accurate bundling, you must keep the software catalog up to date. IBM publishes a new version of the software catalog once a month. This catalog must be imported into Software Knowledge Base Toolkit. You then publish the catalog in Software Knowledge Base Toolkit and import it into Tivoli Asset Discovery for Distributed and IBM SmartCloud Control Desk. Importing the catalog is covered in the optional Appendix A exercises.

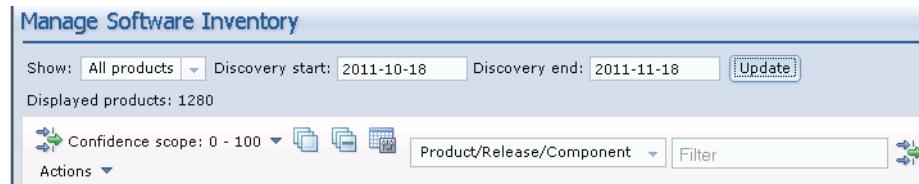
- _____ 11. Click the **Collapse All** icon to collapse the expanded product.

- ___ 12. Keep the **Manage Software Inventory** view open and proceed to the next exercise.

Exercise 8-9: Filtering Manage Software Inventory

In large environments, it is possible to have thousands of unconfirmed instances. Managing this number of instances can be a challenging task. To make this task more manageable, you can use several filtering options. Filtering the software inventory list can help you focus on one section at a time. This exercise demonstrates how to use the parameters in the top panel to filter the software inventory list.

- ___ 1. Verify that you are on the **Manage Software Inventory** view. If you closed it, click **Tivoli Asset Discovery > Software > Manage Software Inventory**.
- ___ 2. Review the top panel. Make note of the current filter settings such as **Show All products**, the **Discovery** time period, and the **Confidence scope**.



- ___ 3. From the **Show** list, select **PVU products**.
- ___ 4. Click **Update**. Notice that the product count decreased from **1280** to **951**. You can also scroll through the software list to see the new products in the list.



- ___ 5. From the **Show** list, select **Systems products** and click **Update**.
The list now only shows **32** products.
- ___ 6. From the **Show** list, select **All products** and click **Update** to return to the original filter setting.
- ___ 7. Click the date in the **Discovery start** field.
A calendar is displayed.
- ___ 8. Change the date to **October 01, 2011**.

___ 9. Click **Update**.

An error message indicates that the start date was adjusted to be valid.

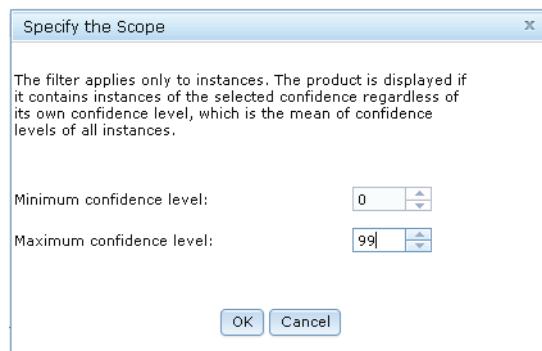
You can only select a date range that is not covered by a signed audit report. Therefore, the earliest date that you can set for the current data is **October 10, 2011**.

___ 10. Click the **X** in the upper-right corner of the error message to dismiss it.

___ 11. Click **Confidence Scope** and select **Change the instance confidence filter settings**.



___ 12. Change the Maximum confidence level to **99** and click **OK**.



___ 13. Review the software inventory list.

The software list now only shows **335** products.

All of the products listed include unconfirmed instances. You can also narrow the list down further to show lower confidence levels such as **0 - 50**. You can use this filter to focus on bundling assignments with the lowest confidence of being accurate.

___ 14. Keep the Confidence scope filter set to **0 - 99**.

___ 15. Select **Product/Release/Component** and enter **DB2** in the Quick filter field.

___ 16. Click the **Quick Filter** icon. The Quick Filter icon is to the right of the filter field.



This filter searches the current view for all entries with the text **DB2** in the product, release, or component name. You can also change the quick filter to search host name, current server ID, operating system, scan group, processor type, or part number for the text string you enter.

- ___ 17. Review the software inventory list.

The software inventory list now shows **41** products.

This list includes all products, releases, and components with a confidence level **below 100%** and have **DB2** in the name. You can save this information to a comma-separated values file (CSV). In this example, you can take that list to your DB2 administrators to determine why these instances are installed. You need to understand the purpose of an instance to correctly assign it to the correct product. Often, the best source for this information is the application owner or administrator. They can help you identify what application server instances are stand-alone products and which instances are components of other products. If the servers have multiple instances, you can supply that information to the administrator. You can then decide which instances you can confirm and which ones must be assigned to another product.

- ___ 18. Click the **Download as CSV** link at the bottom of the Manage Software Inventory page.

- ___ 19. Select **Save File** and click **OK**.

- ___ 20. Click **Save** to save the software inventory report compressed file to the **Downloads** directory. The file name can vary. It always starts with **SoftwareInventoryReport** and ends with the current date and time.

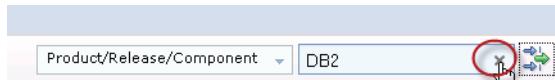
- ___ 21. Right-click the compressed file in the Downloads window and select **Open**.

The file contains an export of the current view in a comma-separated values format. This file can be opened in a spreadsheet application and used as a resource as you try to determine the purpose of the instances in question.

- ___ 22. Close the compressed file contents window.

- ___ 23. Return to the console.

- ___ 24. Click the **X** in the filter box to clear the **DB2** text filter.



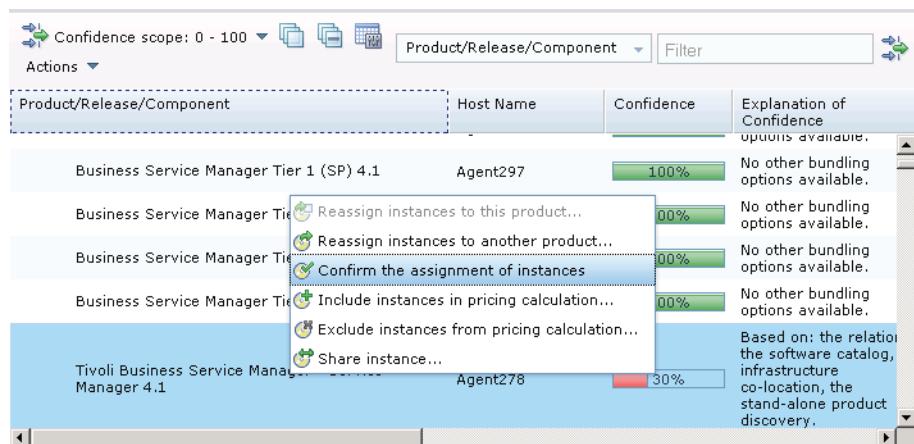
- ___ 25. Click **Confidence Scope** and select **Clear the instance confidence filter**. The only remaining filter is **Show All Products**.

- ___ 26. Keep the **Manage Software Inventory** tab open and proceed to the next exercise.

Exercise 8-10: Confirming the assignment of instances

In many cases, the instance assignments that are performed by the automatic bundling rules are correct. When you have unconfirmed instances that are correctly assigned, you confirm the assignment of the instance in Manage Software Inventory. Confirming an instance changes the confidence to 100% for that instance. This exercise demonstrates how to confirm the assignment of instances.

- ___ 1. Verify that you are on the **Manage Software Inventory** tab. If you closed it, click **Tivoli Asset Discovery > Software > Manage Software Inventory**.
- ___ 2. Find the **Business Service Manager Tier 1** product. Make note of the confidence level.
- ___ 3. Expand the **Business Service Manager Tier 1** product.
- ___ 4. Expand **Business Service Manager Tier 1 4.1** release.
- ___ 5. Scroll down to view the unconfirmed instance on the **Agent278** host.
- ___ 6. Right-click the **Agent278** instance and select **Confirm the assignment of instances**. You can click anywhere in the row.



An action menu is displayed that lists the instance management options. This action menu can be accessed at various locations within Manage Software Inventory.

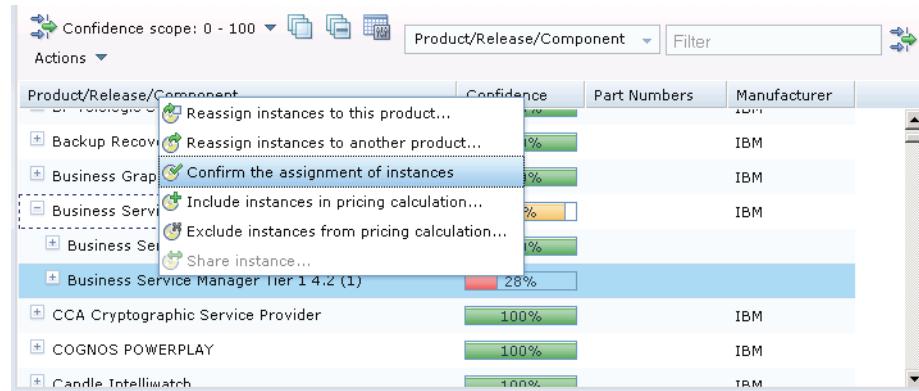
- ___ 7. Find the **Business Service Manager Tier 1** product.

The confidence level of the product increased from **79% to 89%**.

When you confirmed the instance, the confidence level for that instance changed to 100% because it was manually confirmed by you and is no longer unconfirmed. The confidence level increase rolls up to the product level. Also, the PVU values are recalculated. Any time that you take an action on an instance for a PVU-based product, the PVU values are recalculated. Any unsigned audit reports are regenerated. In this instance, even though the reports are regenerated, the actual values in the

report do not change. You are confirming the instances and not assigning them to a different product.

- ___ 8. Expand the **Business Service Manager Tier 1** products.
- ___ 9. Notice that the confidence level of the **Business Service Manager Tier 1 4.1** release is now 100%.
- ___ 10. Right-click the **Business Service Manager Tier 1 4.2** release and select **Confirm the assignments of instances**.



Confirming instances at the release level is a quick way to accept the bundling assignment for multiple instances under a release. Use this option when you are sure that all instances are correctly assigned. If you make a mistake and incorrectly assign an instance, you can come back and reassign instances to another products. That process is covered in Exercise 8-11, “Reassigning instances to another product” on page 8-19.

- ___ 11. Find the **Business Service Manager Tier 1** product. The **Business Service Manager Tier 1** product now has a confidence level of 100%.

You confirmed all instance assignments for the product. Your goal is to resolve all unconfirmed instances before signing the PVU report.

- ___ 12. Click **Tivoli Asset Discovery > IBM Audit Reports > View Reports**. The reports are in a running state. If the reports are in a ready state, the report generation completed before you opened the review reports. You can continue to the next step.

Unsigned PVU reports are regenerated every time that you make a change in Manage Software Inventory. Changes include confirming instances, reassigning instances, and including or excluding instances in pricing calculations.

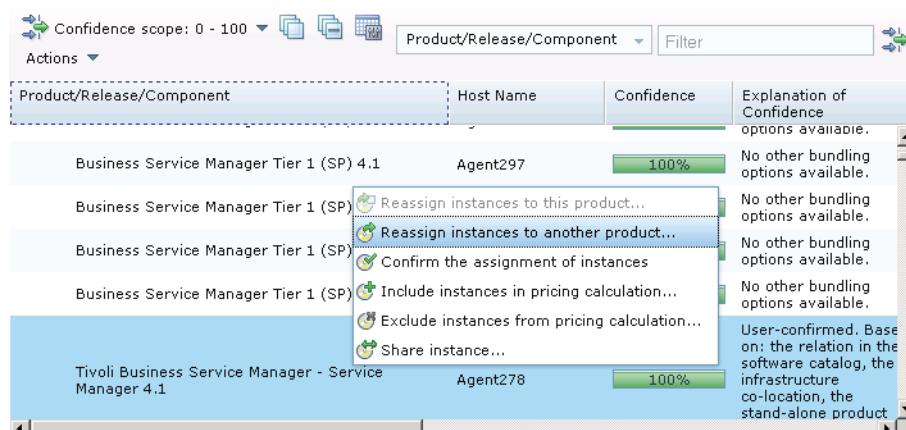
- ___ 13. Wait a few minutes for the recalculation task to run.
- ___ 14. Refresh the report view. You can refresh the view by clicking the **View Reports** tab. Verify that the reports change back to a **Ready** status. If the reports are in a **Running** state, refresh the view a few times until you see the status change. It can take a few minutes for the recalculation task to complete.

- ___ 15. Click the **Ready** link for the report with an End date of **Nov 8, 2011**.
- ___ 16. Verify that the unconfirmed instances icon no longer exists for the **Business Service Manager Tier 1** product.
- ___ 17. Close the **Report View** tab.

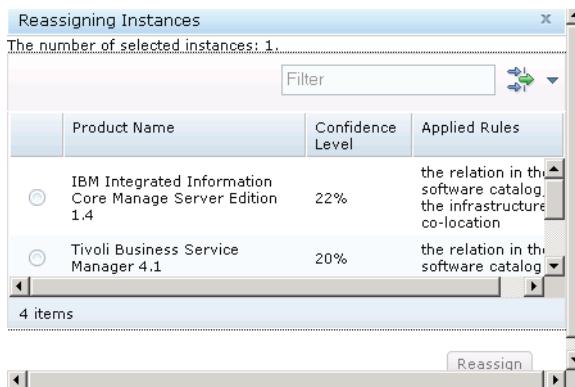
Exercise 8-11: Reassigning instances to another product

As mentioned in the previous exercise, you can reassign an instance if you incorrectly confirmed it. This exercise demonstrates how to reassign instances to another product.

- ___ 1. Verify that you are on the **Manage Software Inventory** tab. If you closed it, click **Tivoli Asset Discovery > Software > Manage Software Inventory**.
- ___ 2. Find and expand the **Business Service Manager Tier 1** product.
- ___ 3. Expand **Business Service Manager Tier 1 4.1** release.
- ___ 4. Scroll down to view the instance on the **Agent278** host.
- ___ 5. Right-click the **Agent278** instance and select **Reassign instances to another product**.



- ___ 6. Review the list of available products for reassignment.

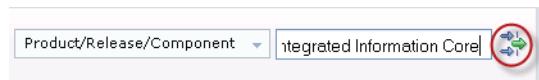


This product list is created based on the software hierarchy and relationships within the software catalog. If the product that you want to reassign the instance to is not in the list, verify that it is a valid component of the missing product. You can verify this information by reviewing the License Information (LI) for the product. To search for license information for products, go to <http://www-03.ibm.com/software/sla/sladb.nsf/search>. If you have trouble finding a product, use the following search tips:

- Use partial product names (as opposed to full long names).
- Use unique words in product names. For example, when searching for WebSphere Message Broker for zEnterprise, enter **Message Broker** as the search parameter.

If you validate that a component should be assignable to an IBM product that is missing from the list, open a Problem Record (PMR) with Tivoli support.

- ___ 7. Select **IBM Integrated Information Core Manage Server Edition 1.4** and click **Reassign**.
- ___ 8. Enter **IBM Integrated Information Core** in the quick filter and click the **Quick Filter** icon.

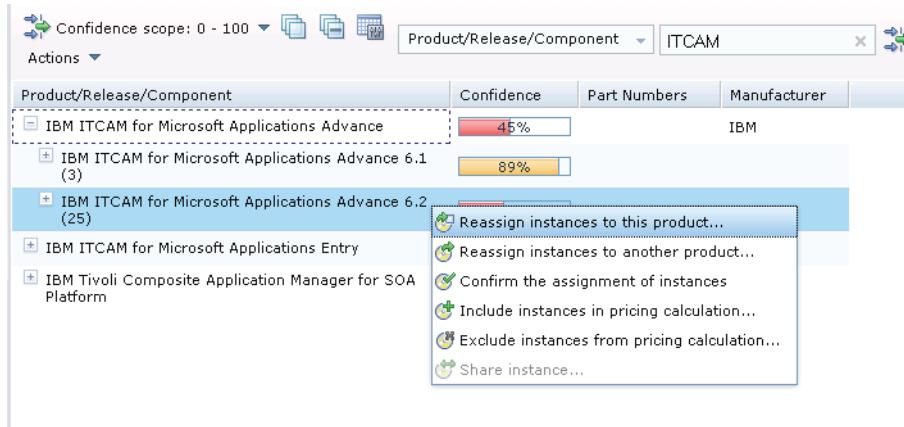


- ___ 9. Expand the **IBM Integrated Information Core Manage Server Edition** product.
- ___ 10. Expand the **IBM Integrated Information Core Manage Server Edition 1.4** release.
- ___ 11. Scroll down and verify that the **Tivoli Business Service Manager - Service Manager 4.1** instance on **Agent278** is assigned to this product.
Notice that the Explanation of Confidence now indicates **User-bundled**.
- ___ 12. Click the X in the filter to clear the **IBM Integrated Information Core** filter.
- ___ 13. Keep the **Manage Software Inventory** tab open and proceed to the next exercise.

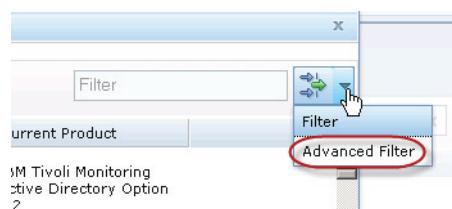
Exercise 8-12: Reassigning instances to this product

Another option for assigning instances is to select a product at the release level and select **Reassign instances to this product**. This approach is useful when you work with an application owner to identify the servers where their application is installed. You start at the product and release level and then select one or more instances to assign. This exercise demonstrates this approach to reassignment.

- ___ 1. Verify that you are on the **Manage Software Inventory** tab. If you closed it, click **Tivoli Asset Discovery > Software > Manage Software Inventory**.
- ___ 2. Enter **ITCAM** in the filter and click the **Quick Filter** icon.
- ___ 3. Expand the **IBM ITCAM for Microsoft Applications Advance** product.
- ___ 4. Notice that the **IBM ITCAM for Microsoft Applications Advance 6.2** release has **25** instances assigned to it.
- ___ 5. Right-click the **IBM ITCAM for Microsoft Applications Advance 6.2** release and select **Reassign instances to this product**.

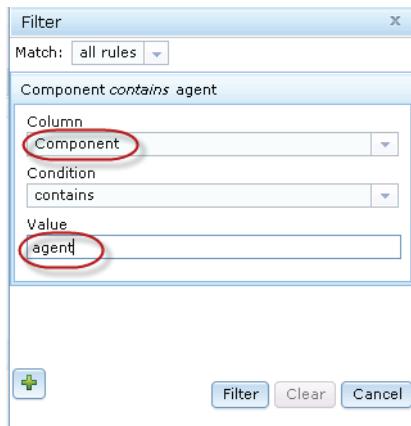


- ___ 6. Notice that there are **165** possible components that can be assigned to the **IBM ITCAM for Microsoft Applications Advance 6.2** release.
- ___ 7. Click the arrow to the right of the **Quick Filter** icon in the product list window and select **Advanced Filter**.



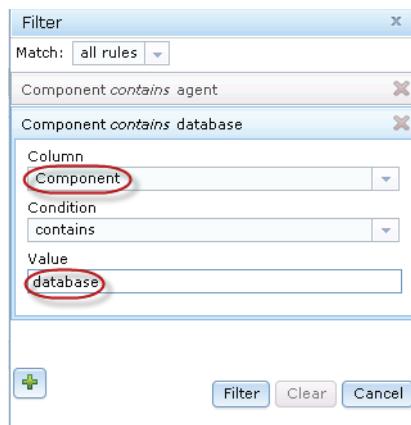
You can use the advanced filter to narrow the component list.

- ___ 8. Select **Component** for the Column and enter **agent** for the value.



- ___ 9. Click the plus sign (+) to add another filter rule.

- ___ 10. Select **Component** for the Column and enter **database** for the value.



- ___ 11. Click the plus sign (+) to add another filter rule.

- ___ 12. Select **Component** for the Column and enter **6.2** for the value.



This filter shows all components with **agent**, **database**, and **6.2** in the component name.

- ___ 13. Click **Filter**.

The component list was reduced from **165** to **10**.

- ___ 14. Review the list.

- ___ 15. Click the **select all** box to the left of the component column and click **Reassign**.

- ___ 16. Expand the **IBM ITCAM for Microsoft Applications Advance** product.

- ___ 17. Notice that the **IBM ITCAM for Microsoft Applications Advance 6.2** release now has **35** instances assigned to it.

- ___ 18. Click the **X** in the filter box to clear the **ITCAM** filter.

- ___ 19. Keep the **Manage Software Inventory** tab open and proceed to the next exercise.

Exercise 8-13: Excluding product instances

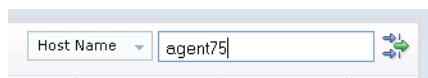
Periodically, IBM Tivoli Asset Discovery for Distributed discovers an instance that can be excluded from PVU calculation. For example, your license agreement might allow you to exclude instances

on a disaster recovery server. When you exclude an instance, you must indicate the reason for exclusion. The following options are available:

- Evaluation, trial
- Backup, disaster recovery
- Alpha, beta, early support program
- Component of a non-licensed product: If the product has a different licensing model than the PVU or systems one, its component might be excluded from the calculations, depending on your license agreement.
- Not eligible for licensing: The PVU or systems license agreement was not signed for a product.
- Component is not compatible with the server or agent system: The component is installed on a server and cannot be initiated because of differences, for example, in the architecture or operating system. An example might be a file server.
- Other: You must enter additional comments to justify the exclusion.

You can also include an instance to ensure that it is included in the pricing calculation. This exercise demonstrates how to exclude instances. The process for including an instance is the same.

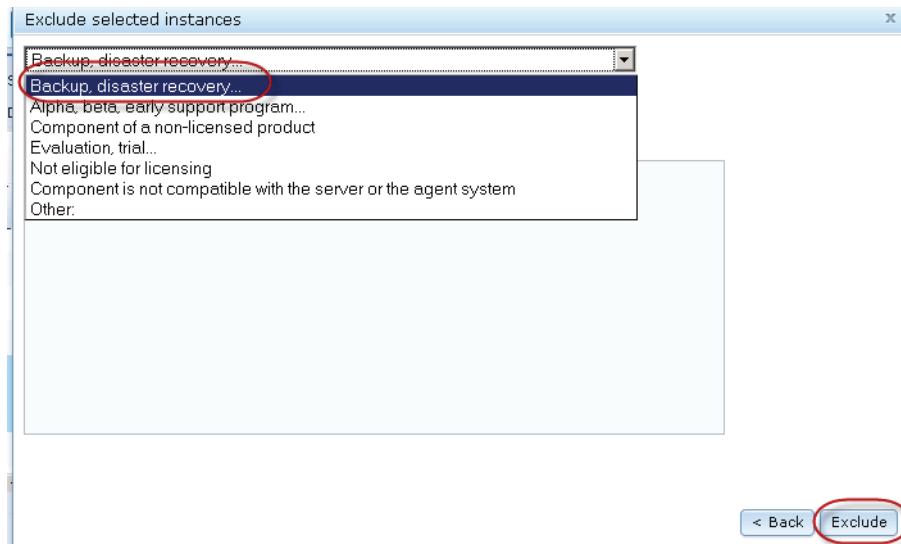
- ___ 1. Verify that you are on the **Manage Software Inventory** tab. If you closed it, click **Tivoli Asset Discovery > Software > Manage Software Inventory**.
- ___ 2. Select **Host Name** for the filter and enter **agent75** in the filter and click the **Quick Filter** icon.



- ___ 3. Expand the **IBM DB2 Express Edition CPU Option** product.
- ___ 4. Expand the **IBM DB2 Express Edition CPU Option 9.5** release.
- ___ 5. Right-click the instance and select **Exclude instances from pricing calculation**.

| Product/Release/Component | Host Name | Confidence | Explanation of Confidence |
|--|-----------|------------|---|
| Non-Production Environment | | | |
| + IBM Collaboration Accelerator | | | |
| + IBM DB2 Express Edition CPU | | | |
| + IBM DB2 Express Edition CPU Option 9.5 | agent75 | 100% | Based on: the relationship between the software catalog, stand-alone product discovery. |
| + IBM DB2 Performance Expert for Workgroup Edition | | | |

- ___ 6. Verify that the instance is in the selected instances list and click **Next**.
- ___ 7. Select **Backup, disaster recovery** for the exclusion reason and click **Exclude**.



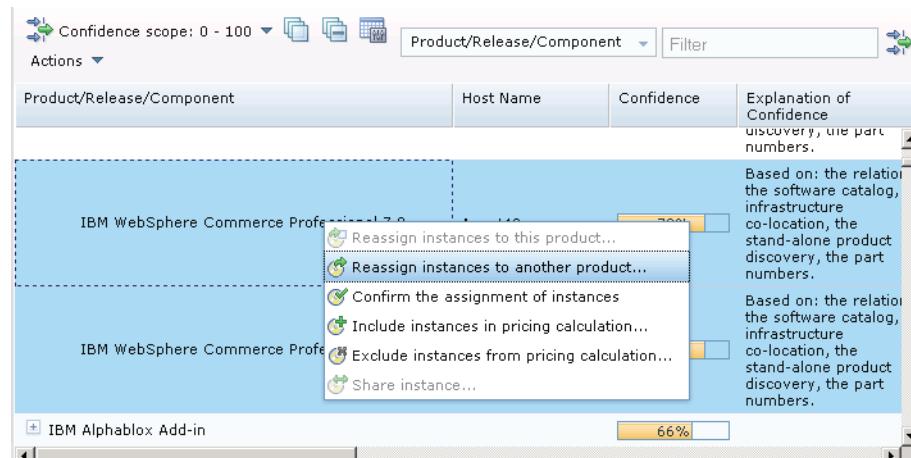
Note: When you exclude instances from PVU calculations, the reason is displayed in the PVU audit detail report.

- ___ 8. Expand the **IBM DB2 Express Edition CPU Option** product.
- ___ 9. Expand the **IBM DB2 Express Edition CPU Option 9.5** release.
- ___ 10. Place your cursor over the new icon to the right of the instance.
This icon indicates that the instance is excluded. The message provides the exclusion explanation that you specified.
- ___ 11. Right-click the instance and select **Confirm the assignment of instances**.
- ___ 12. Click the X in the filter box to clear the **agent75** filter and change the filter back to **Product/Release/Component**.
- ___ 13. Keep the **Manage Software Inventory** tab open and proceed to the next exercise.

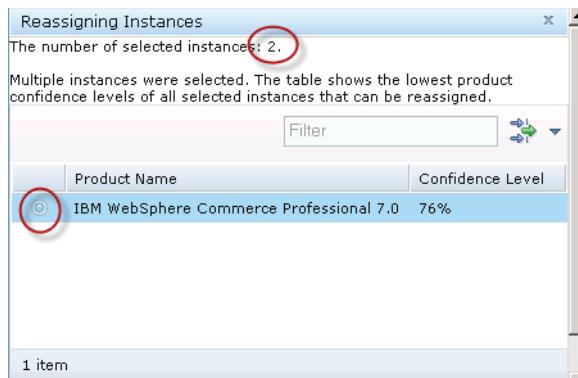
Exercise 8-14: Resolving PVU discrepancies

In the previous unit, you saw an example where the entitlement PVU count did not match the discovered capacity. This exercise demonstrates how you can approach that situation in IBM Tivoli Asset Discovery for Distributed.

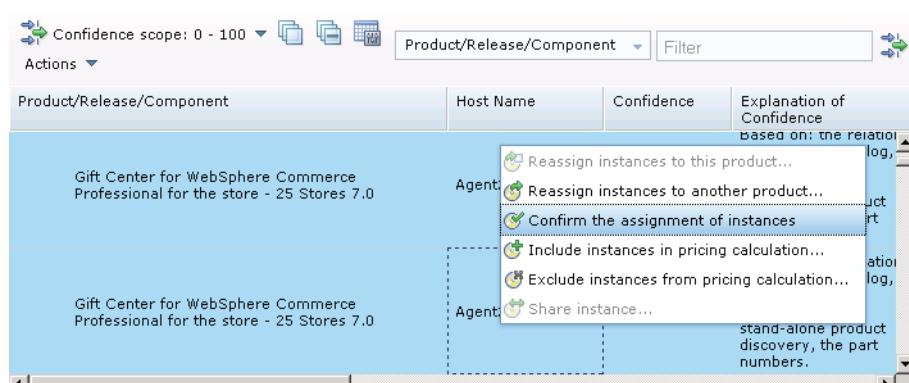
- ___ 1. Click **Tivoli Asset Discovery > IBM Audit Reports > View Reports**.
- ___ 2. Click the **Ready** link for the report with an End date of **Nov 8, 2011**. If the report is in a running state, wait a few minutes for it to regenerate. The software inventory changes that you made in the previous exercises can trigger the regeneration.
- ___ 3. Find the **Gift Center for WebSphere Commerce Professional for the store - 25 Stores** entry.
- ___ 4. Write down the PVU values: _____.
- ___ 5. Close the **View Reports** tab.
- ___ 6. Verify that you are on the **Manage Software Inventory** tab. If you closed it, click **Tivoli Asset Discovery > Software > Manage Software Inventory**.
- ___ 7. Change the Show filter to show **PVU Products** and click **Update**.
- ___ 8. Find and expand the **Gift Center for WebSphere Commerce Professional for the store - 25 Stores** product.
- ___ 9. Expand the **Gift Center for WebSphere Commerce Professional for the store - 25 Stores 7.0** release.
- ___ 10. Scroll down and find the instances for the **agent43** and **agent133** hosts.
- ___ 11. Select both instances using the Shift or Ctrl key.
- ___ 12. Right-click either instance and select **Reassign instances to another product**.



- ___ 13. Verify that the number of selected instances is **2**. If it is not, close the Reassigning Instances window and reselect the instances.
- ___ 14. Select **IBM WebSphere Commerce Professional 7.0** and click **Reassign**.



- ___ 15. Expand the **Gift Center for WebSphere Commerce Professional for the store - 25 Stores** product.
- ___ 16. Expand the **Gift Center for WebSphere Commerce Professional for the store - 25 Stores 7.0** release.
- ___ 17. Scroll down and find the instances for the **agent150**, **agent23**, **agent241**, and **agent219** hosts.
- ___ 18. Select the four instances by using the Shift or Ctrl keys.
- ___ 19. Right-click and select **Confirm the assignment of instances**.

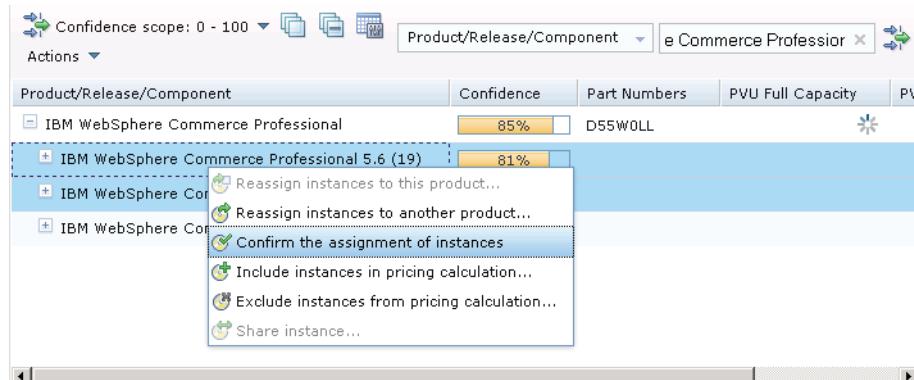


- ___ 20. Verify that the confidence level for the **Gift Center for WebSphere Commerce Professional for the store - 25 Stores** product is 100%.
- ___ 21. Find and expand the **IBM WebSphere Commerce Professional** product.



Tip: Use the filtering by product, release, and component that you learned in Exercise 8-9, “Filtering Manage Software Inventory” on page 8-14.

- ___ 22. Select the two releases with unconfirmed instances and select **Confirm the assignment of instances**.



- ___ 23. Verify that the confidence level for the **IBM WebSphere Commerce Professional** product is 100%.
- ___ 24. Close the **Manage Software Inventory** view.
- ___ 25. Click **Tivoli Asset Discovery > IBM Audit Reports > View Reports**.
- ___ 26. Wait a few minutes for the unsigned reports to change to the ready state. It can take several minutes for the report to regenerate. Periodically refresh the page until the status changes.
- ___ 27. Click the **Ready** link for the report with an End date of **Nov 8, 2011** to open it.
- ___ 28. Find the **Gift Center for WebSphere Commerce Professional for the store - 25 Stores** entry.
- ___ 29. Notice that the unconfirmed instances warning is gone and that the PVU subcapacity value is now **4860**.
- ___ 30. Find the **IBM WebSphere Commerce Professional** entry.



Note: You can use the Show Filter Row to search for the IBM WebSphere Commerce Professional entry. Click the **Show Filter Row** icon and enter **IBM WebSphere Commerce Professional** in the Product search field.

- ___ 31. Notice that the unconfirmed instances warning is gone and that the PVU subcapacity value is now **12540**.

- ___ 32. Compare these values to the Entitlement report in the following screen capture.

| | | |
|---------|--|-------|
| E07D4LL | IBM WEBSPHERE ASSET INVENTORY MANAGEMENT SERVICES FOR WEBSPHERE SENSOR E | 3300 |
| D57P4LL | IBM GIFT CENTER FOR WEBSPHERE COMMERCE ENTERPRISE FOR THE STORE - 25 STORES | 4140 |
| E02G1LL | IBM GIFT CENTER FOR WEBSPHERE COMMERCE PROFESSIONAL FOR THE STORE - 25 STORES | 4860 |
| E01ZTLL | IBM DB2 ALPHABLOX FOR LINUX, UNIX AND WINDOWS PROCESSOR VALUE UNIT (PVU) ANNUAL | 28600 |
| E0200LL | IBM APPLICATION WORKLOAD MODELER FOR LINUX ON ZSERIES PROCESSOR VALUE UNIT (F | 6800 |
| D55W0LL | IBM WEBSPHERE COMMERCE PROFESSIONAL PROCESSOR VALUE UNIT (PVU) LICENSE + SW | 12540 |
| E04S5LL | IBM BUSINESS PROCESS ACCELERATOR PROCESSOR VALUE UNIT (PVU) ANNUAL SW SUBSC | 5500 |
| E04S6LL | IBM BUSINESS PROCESS ACCELERATOR AND WEBSPHERE PORTAL SERVER PROCESSOR V | 6500 |
| D01LDLL | IBM PROCESS CENTER ADVANCED PROCESSOR VALUE UNIT (PVU) LICENSE + SW SUBSCRIF | 4000 |
| D01M2LL | IBM PROCESS CENTER EXPRESS PROCESSOR VALUE UNIT (PVU) LICENSE + SW SUBSCRIPT | 1000 |
| D01M6LL | IBM PROCESS CENTER STANDARD PROCESSOR VALUE UNIT (PVU) LICENSE + SW SUBSCRIP | 2700 |
| D55KZLL | IBM CICS TRANSACTION GATEWAY PROCESSOR VALUE UNIT (PVU) LICENSE + SW SUBSCRIP | 20000 |
| D0AMILL | IBM TIVOLI CLOUDBURST ADDITIONAL UNIT PROCESSOR VALUE UNIT (PVU) SW SUBSCRIPTION | 4000 |
| E063ELL | COGNOS 8 FIN PERF AP ANALYTICS PVU ANNUAL SW S&S RNWL | 16000 |
| E063DLL | COGNOS 8 FIN PERF AR ANALYTICS PVU ANNUAL SW S&S RNWL | 18000 |

The PVU values for the products now match the entitlement.

Exercise 8-15: Signing the reports

After verifying a PVU report, you must sign it to accept the results. PVU reports must be signed at least every three months in a production environment. If you have both a PVU and systems audit report in **Ready** status, both reports are signed when you click **sign it**.



Important: Before you sign any reports, you must verify the data. You want to confirm all unconfirmed instances.

- ___ 1. Verify that you are viewing the report with an End date of **Nov 8, 2011**. If you are not, click **Tivoli Asset Discovery > IBM Audit Reports > View Reports** and the **Ready** link for the report with an End date of **Nov 8, 2011**.
- ___ 2. Click the **sign it** link.



Note: In a production environment, do not sign the report until you verify that all of the PVU data reported is correct.

- ___ 3. Enter comments for the software report.

The comment section is available for both the PVU and systems audit report when systems audit reporting is enabled.

The systems report comments are always optional. However, there are instances where the PVU report comments are mandatory. You must enter comments under the following conditions:

- There were no PVU-eligible products discovered for the selected reporting period.
- A significant number of agents failed to perform the software scan.

- ___ 4. Click **Sign**. You might have to scroll down to see the **Sign** button.



Note: This process can take a few minutes.

- ___ 5. Wait for the **Report has been successfully signed message** and click **Close**.

After the report is signed, it must be kept for two years. You can save the XML report to a disk that is backed up. Alternatively, you can back up the database and save it for two years after each report is signed.

- ___ 6. Click the **Audit Reports** breadcrumbs.

- ___ 7. Review the Audit Report list.

The signed report is displayed with the date that it was signed and the name of the person who signed the report. Also, all of the other reports are now in the **View Only** status. You cannot have overlapping signed reports. Because the time periods for all four reports included dates from October 18, 2011 and later, the unsigned reports change to **View Only**.

- ___ 8. Click the **Signed** link.

- ___ 9. Scroll to the bottom of the page.

Now that the report is signed, a third option to save the report as **XML** was added.



Important: For large environments, the detailed PDF audit report (**Download the whole report** as PDF) can be large. The XML report has all the detailed information and the signature, but the report is in a compressed format.

- ___ 10. Close the **View Reports** tab.

Exercise 8-16: Managing software monitoring configuration

IBM Tivoli Asset Discovery for Distributed can collect use data for software products. Collecting use data allows you to monitor low use software. For example, a user might have Microsoft Excel installed, but they never use it. By monitoring product use, you can identify these situations. The user can be asked to uninstall Microsoft Excel, and the license can be given to someone else. This exercise demonstrates how to enable use monitoring.

- ___ 1. Click **Tivoli Asset Discovery > Software > Software Monitoring Configuration**.

- ___ 2. Review the software list.

None of the products are configured to collect software use data.

- ___ 3. Click the **Show Filter Row** icon.
- ___ 4. Click the **Filter** link in the Product column.
- ___ 5. Enter **IBM Lotus Notes** in the Text field and click **OK**.



- ___ 6. Select the three IBM Lotus Notes releases.

| Select | Manufacturer | Product | Instances | Use Data Collection | Multiple Instance Identification |
|-------------------------------------|--------------|----------------------|-----------|-------------------------------|-----------------------------------|
| | | Filter | Filter | Filter | Filter |
| <input checked="" type="checkbox"/> | IBM | IBM Lotus Notes 4.6 | 1 | <input type="checkbox"/> None | <input type="checkbox"/> Disabled |
| <input checked="" type="checkbox"/> | IBM | IBM Lotus Notes 8.02 | 1 | <input type="checkbox"/> None | <input type="checkbox"/> Disabled |
| <input checked="" type="checkbox"/> | IBM | IBM Lotus Notes 8.00 | 1 | <input type="checkbox"/> None | <input type="checkbox"/> Disabled |

Page 1 of 1 1 Go Rows 10 Total: 2332 Filtered: 3

- ___ 7. Click **Select Action > Change Data Collection Level**.
- ___ 8. Select **Collect product use information**.
- ___ 9. Click the **Use with caution due to large amount of data produced** link. The product documentation opens in a separate tab. Review the descriptions of the different settings.
- ___ 10. Close the **Help** tab.
- ___ 11. Select any collection level and click **OK**.
- ___ 12. Notice that the **Use Data Collection** column indicates the collection level that you configured. If you selected a different collection level, your results are different from this screen capture.

| Select | Manufacturer | Product | Instances | Use Data Collection | Multiple Instance Identification |
|--------------------------|--------------|----------------------|-----------|---------------------|-----------------------------------|
| | | Filter | Filter | Filter | Filter |
| <input type="checkbox"/> | IBM | IBM Lotus Notes 4.6 | 1 | Summary and trend | <input type="checkbox"/> Disabled |
| <input type="checkbox"/> | IBM | IBM Lotus Notes 8.02 | 1 | Summary and trend | <input type="checkbox"/> Disabled |
| <input type="checkbox"/> | IBM | IBM Lotus Notes 8.00 | 1 | Summary and trend | <input type="checkbox"/> Disabled |

Page 1 of 1 1 Go Rows 12 Total: 2331 Filtered: 3

- ___ 13. Close the **Software Monitoring Configuration** tab.



Note: Product use collection cannot be viewed in the IBM Tivoli Asset Discovery for Distributed console. To view the results, you must run the Tivoli Common Reporting reports that ship with IBM Tivoli Asset Discovery for Distributed. Because this course is using demonstration data, you cannot view your changes.

- ___ 14. Log out of the console.

Exercise 8-17: Navigating the Software Knowledge Base Toolkit

To ensure that IBM Tivoli Asset Discovery for Distributed can discover all software that you want to manage, you must verify that the software catalog contains all the appropriate signatures. The Software Knowledge Base Toolkit is the software catalog source for IBM Tivoli Asset Discovery for Distributed. This exercise demonstrates the basic steps for navigating the console so that you can verify the software catalog before publishing it for use by IBM Tivoli Asset Discovery for Distributed. If software items and signatures are missing, you can add them. Exercise 8-18, “Adding a manufacturer” on page 8-37 through Exercise 8-25, “Managing unmatched registry entries” on page 8-45 detail how to add software items and signatures.

- ___ 1. Double-click **Start Software Knowledge Base Toolkit** shortcut on the desktop.
- ___ 2. Wait for the script to complete.
- ___ 3. Press any key to close the command prompt.
- ___ 4. Open the web browser, and click the **Software Knowledge Base Toolkit** bookmark.
- ___ 5. Log in to Tivoli Software Knowledge Base Toolkit as **KB_Manager** with the password **object00**.



Note: When you install the Software Knowledge Base Toolkit, the functions are not displayed in the console because administrator IDs have not been granted access. You must configure the groups and user before using the toolkit. For information about configuring access, go to http://publib.boulder.ibm.com/infocenter/tamit/v7r2m2/topic/com.ibm.swkbt_1.2.2.doc/com.ibm.ins.doc/t_configuringskb.html. The **KB_Manager** administrator ID is configured for you on your image.

- ___ 6. Click **IBM Tivoli Software Knowledge Base Toolkit**.

- ___ 7. Review the available categories.



- ___ 8. Click **Manage Software > Find Software**.
- ___ 9. Enter **Tivoli Monitoring** in the Search by text field and click **Find**.
- ___ 10. Review the results. Notice that there are two different types of icons next to the software items in the list.
- ___ 11. Place your cursor over the icons for the first two software items and read the descriptions.

Use this window to search the knowledge base for existing software items. After you perform the search, you can view software details.

Search Criteria

Search by text:

Software type:

Search Options

Fuzzy search
 Include deleted software
 Include software aliases

Search Results

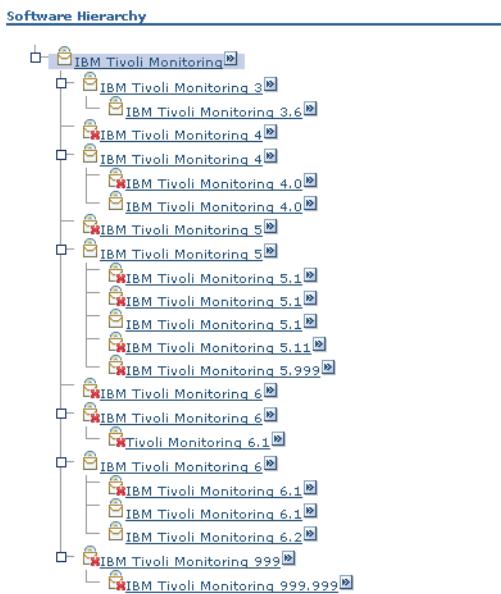
There are 89 distributed software items found.

| Select | Software | Manufacturer |
|-----------------------|---|--------------|
| <input type="radio"/> |  IBM Tivoli Monitoring | IBM |
| <input type="radio"/> |  IBM Tivoli Monitoring | IBM |
| <input type="radio"/> |  IBM Tivoli Monitoring - AIX Premium Agent | IBM |
| <input type="radio"/> |  IBM Tivoli Monitoring - CEC Base Agent | IBM |
| <input type="radio"/> |  IBM Tivoli Monitoring - Citrix Agent | IBM |
| <input type="radio"/> |  IBM Tivoli Monitoring - Eclipse Help Server | IBM |

The icon with a gear indicates that the software item is a component. The icon with an envelope and disk indicates that the software item is a product.

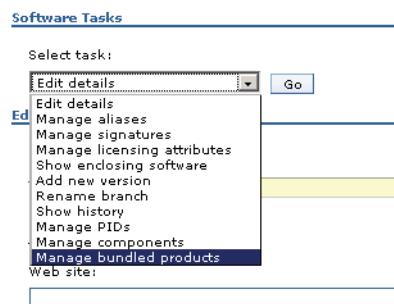
- ___ 12. Click the **IBM Tivoli Monitoring** software product to open it.

- ___ 13. Review the software hierarchy. Entries with a red X have been deleted. Deleted items have been deemed invalid or no longer needed by the business. They are saved in the catalog and can be restored if needed.



- ___ 14. Click **Edit details** in the Software Task section.

A list of software tasks is displayed.



- ___ 15. Click **Manage licensing attributes** and click **Go**.

The licensing attributes and part numbers for IBM Tivoli Monitoring are displayed.

This screenshot shows the Software Knowledge Base Toolkit interface. On the left, there is a tree view of software products under the category 'IBM Tivoli Monitoring'. On the right, there are three main sections: 'Software Tasks', 'Manage Licensing Attributes', and 'Part Numbers'.

Software Tasks: A dropdown menu is open, showing 'Manage licensing attributes' with a 'Go' button.

Manage Licensing Attributes: This section contains several checkboxes:

- Not licensable
- Licensable
- Subcapacity licensing
- PVU licensing
- IBM IPLA

Part Numbers: A table listing part numbers and their details:

| Select | Part Number | Licensing Type | Description |
|-----------------------|-------------|----------------|---|
| <input type="radio"/> | D01AULL | Other | IBM TIVOLI MONITORING UNIVERSAL AGENT FOR CLIENTS RESOURCE VALUE UNIT SW SUBSCRIPTION & SUPPORT REINSTATEMENT 12 MONTHS |
| <input type="radio"/> | E17LLLLL | Other | TIVOLI DISTRIBUTED MONITORING TIVOLI MC POINT ANNUAL SW S&S RNWL |
| <input type="radio"/> | D5826LL | Subcapacity | IBM TIVOLI MONITORING UNIVERSAL AGENT/A BUILDER MONITORING 10 PROCESSOR VALUE (PVUS) LICENSE + SW SUBSCRIPTION & SUPPORT MONTHS |
| <input type="radio"/> | D01A011 | Other | IBM TIVOLI MONITORING FOR LINUX ON SYSTEM |

16. Click the software task menu again and click **Manage bundled products**.

17. Click **Go**.

One bundled product is returned. IBM Tivoli Performance Analyzer is bundled at the product level.

This screenshot shows the 'Edit Distributed Software IBM Tivoli Monitoring' window. The left side features a 'Software Hierarchy' tree. The right side has a 'Software Tasks' section with a dropdown set to 'Manage bundled products' and a 'Go' button.

Manage Bundled Products: A table showing bundled products:

| Select | Software | Relationship | Canonical XML Update |
|-----------------------|---------------------------------|--------------|----------------------|
| <input type="radio"/> | IBM Tivoli Performance Analyzer | Free | Allowed |

- ___ 18. Click **IBM Tivoli Monitoring 6.2** in the software hierarchy. Notice that there are more products bundled at that release level.

The screenshot shows a software tasks interface with the following sections:

- Software Tasks**: A header with a dropdown menu set to "Manage bundled products" and a "Go" button.
- Manage Bundled Products**: A sub-header with a "Bundled product:" dropdown set to "Add Product" and a "Clear" button.
- Bundled Products**: A table with four rows, each representing a bundled product:

| Select | Software | Relationship | Canonical XML Updates |
|-----------------------|--|--------------|-----------------------|
| <input type="radio"/> | IBM DB2 Enterprise Server Edition CPU Option 9 | Free | Allowed |
| <input type="radio"/> | IBM DB2 Enterprise Server Edition CPU Option 9.1 | Free | Allowed |
| <input type="radio"/> | IBM DB2 Enterprise Server OEM Limited Use 9.1 | Free | Allowed |
| <input type="radio"/> | IBM DB2 Workgroup Server | Free | Allowed |

- ___ 19. Close the **Edit Software** and **Find Software** tabs.

Exercise 8-18: Adding a manufacturer

You must define a manufacturer for every software item. If the manufacturer does not exist in the catalog, you can add it. For example, if you want to define software items for in-house applications, you can add a manufacturer entry for your organization. This exercise demonstrates how to add a manufacturer.

- ___ 1. Click IBM Tivoli Software Knowledge Base > Manage Manufacturers.
- ___ 2. Enter **XYZ Software** in the **Name** field under Create Manufacturer. Leave the **Web site** field empty.

The screenshot shows the 'Manage Manufacturers' interface. On the right, there's a 'Create Manufacturer' section. Inside this section, the 'Name' field contains 'XYZ Software' and is highlighted with a red oval. Below the name field is a 'Web site:' field which is empty. There are also 'Match exact name', 'Match case', and 'Include aliases' checkboxes, and 'Create' and 'Clear' buttons.

- ___ 3. Click **Create**.
- ___ 4. Enter **Lab lesson** in the **Reason of Change** field, and click **OK**.

The manufacturer is added. This entry is editable, and software can be added to it.

The screenshot shows the 'Edit manufacturer XYZ Software' interface. In the 'Edit Details' section, the 'Name' field is filled with 'XYZ Software'. Below it is a 'Reason of change:' field which is empty and has a yellow background. To the right, there's a 'Manufacturer Tasks' section with a 'Select task:' dropdown set to 'Manage software' and a 'Go' button. Further down, there are sections for 'Metadata' and 'Additional attributes'. At the bottom, there are 'Apply', 'OK', 'Reset', and 'Cancel' buttons.

- ___ 5. Close the **Edit Manufacturer** and **Manage Manufacturer** tabs.

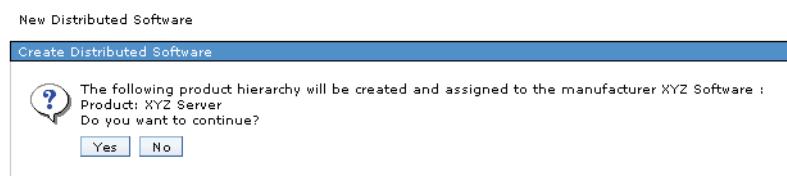
Exercise 8-19: Creating a software product

For new products, you must define the software hierarchy. The top level of the hierarchy is the software product. This exercise demonstrates how to create a software product entry

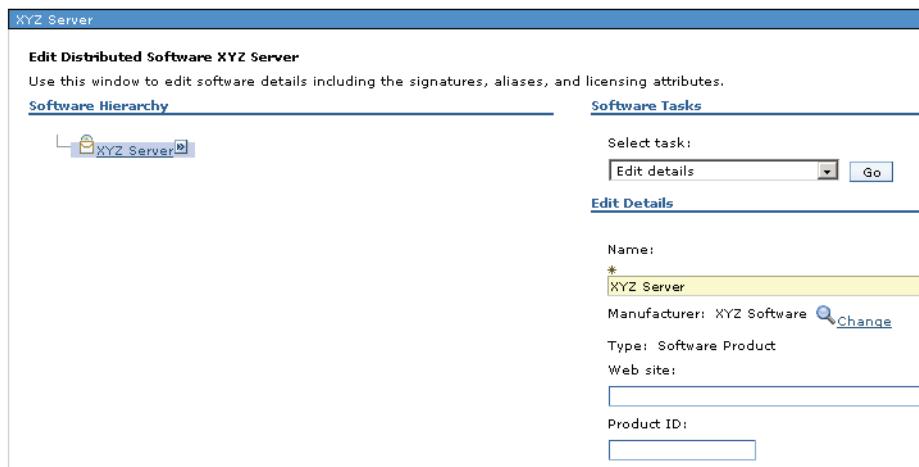
- ___ 1. Click **IBM Tivoli Software Knowledge Base > Manage Software > New software**.
- ___ 2. Enter **XYZ Server** in the Name field.
- ___ 3. Select **XYZ Software** from the Manufacturer list and **Software Product** from the Software Type list.
- ___ 4. Enter **Lab lesson** in the Reason of change field.

The screenshot shows the 'Create Distributed Software' dialog box. The 'Name' field is filled with 'XYZ Server'. The 'Manufacturer' dropdown menu is open, showing 'XYZ Software' as the selected item. The 'Software type' dropdown menu is open, showing 'Software Product' as the selected item. The 'Reason of change' field contains the text 'Lab lesson'. At the bottom of the dialog box are two buttons: 'Create' and 'Clear'.

- ___ 5. Click **Create**.
- ___ 6. Click **Yes** to create the product hierarchy.



- ___ 7. Confirm that the hierarchy is created successfully.



- ___ 8. Close all open tabs.

Exercise 8-20: Adding new items to the software hierarchy

After you define the top-level software product, you can add items to the hierarchy. This exercise demonstrates how to add a version and release to the hierarchy. If you add a version before adding the release level, the release is automatically added.

- ___ 1. Click **IBM Tivoli Software Knowledge Base > Manage Software > New Software**.
- ___ 2. Enter **XYZ Server** in the Name field and **1.1** in the Version Identifier field.
- ___ 3. Select **XYZ Software** from the Manufacturer list and **Software Product** from the Software Type list.

- ___ 4. Enter **Lab lesson** in the Reason of change field.

New Distributed Software

Create Distributed Software

Use this window to add new distributed software items to the knowledge base and associate them with existing items.

Name: *XYZ Server

Version identifier: 1.1

Manufacturer: XYZ Software

[Create manufacturer](#)

Software type: Software Product

Reason of change: *Lab lesson

- ___ 5. Click **Create**.

- ___ 6. Click **Yes** to create the product hierarchy.



Note: Every product release that you add to the knowledge base must be defined as a child of a product version. If the version item does not exist in the knowledge base, it is created automatically based on the version identifier attribute. The version number is set to 1.

XYZ Server 1.1

Edit Distributed Software XYZ Server 1.1

Use this window to edit software details including the signatures, aliases, and licensing attributes.

Software Hierarchy

- XYZ Server
- XYZ Server 1
- XYZ Server 1.1

Software Tasks

Select task: Go

Edit Details

Name: *XYZ Server

Release number: 1.1

Descriptive release name:

Manufacturer: XYZ Software [Change](#)

Type: Software Product

Web site:

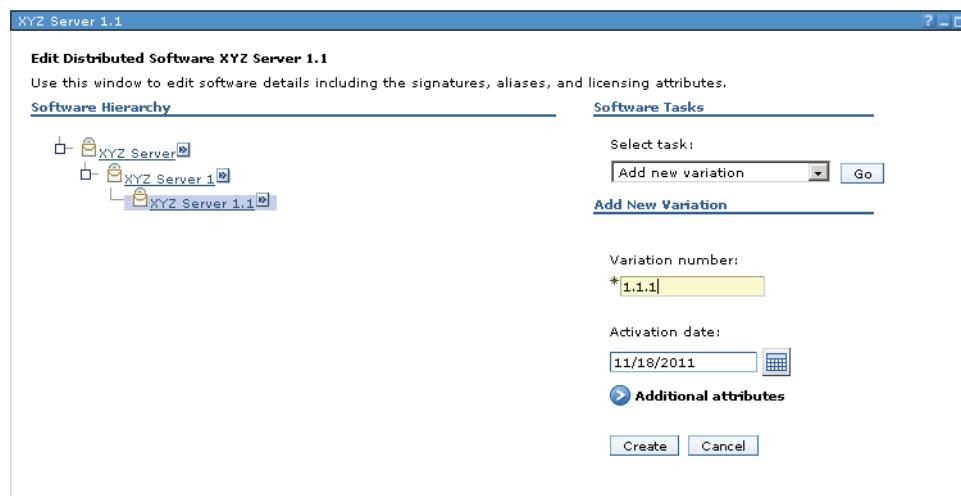
Product ID:

Activation date:

Exercise 8-21: Adding a variation to the software hierarchy

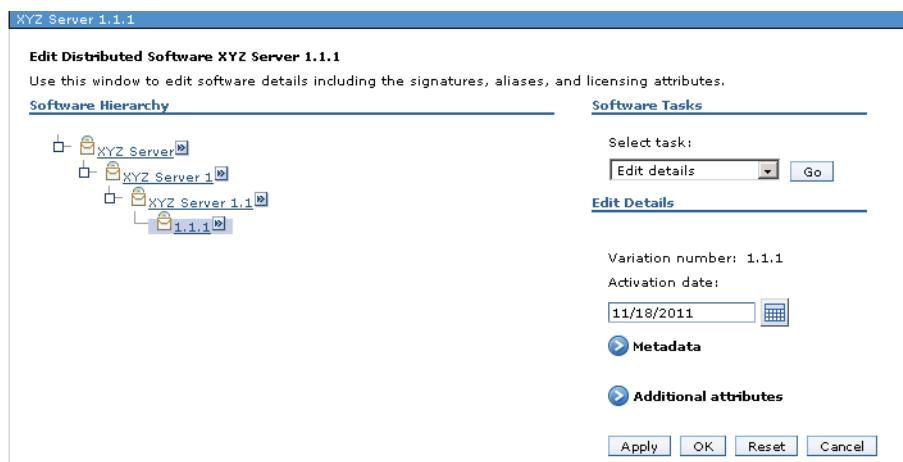
The lowest level in the software hierarchy is the variation level. This level typically indicates a fix release such as 1.1.1. This exercise demonstrates how to add a variation to the software hierarchy.

- ___ 1. Click the **View popup menu** icon next to the **XYZ Server 1.1** release.
- ___ 2. Click **Add new variation**.
- ___ 3. Enter **1.1.1** in the Variation Number field and click **Create**.



- ___ 4. Enter **Lab lesson** in the Reason of change field and click **OK**.

The 1.1.1 variation is added to the hierarchy.



- ___ 5. Close all open tabs.

Exercise 8-22: Adding and assigning a new software signature

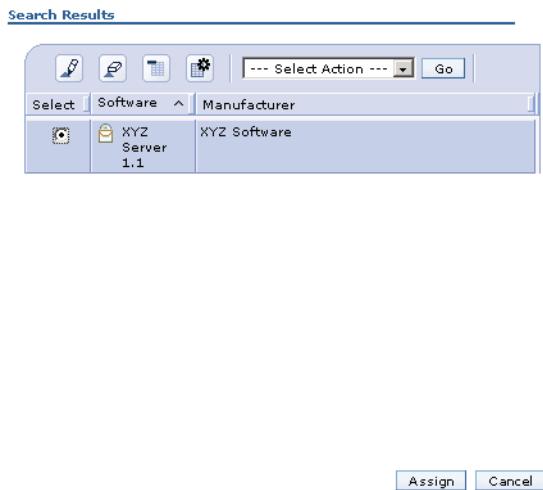
The last step is to add one or more signatures to the software item. IBM Tivoli Asset Discovery for Distributed uses the signatures to discover the software instances. This exercise demonstrates how to manually add a signature to a software item. Signatures must be defined at the release or variation level.

- ___ 1. Click **IBM Tivoli Software Knowledge Base > Manage Signatures > New Signature**.
- ___ 2. Click **Assign**.
- ___ 3. Enter **XYZ Server** in the Software Name field and **XYZ Software** in the Manufacturer field.
- ___ 4. Change the Software level to **Release**, and clear the **Component** option.

The screenshot shows the 'Create Signature' dialog box with the 'Assign Software' tab selected. The 'Search Criteria' section contains fields for 'Software name' (XYZ Server), 'Manufacturer' (XYZ Software), and 'Software level' (Release). The 'Software Type' section has a checked checkbox for 'Product' and an unchecked checkbox for 'Component'. At the bottom, there are search options: 'Match exact name', 'Match case', and 'Include deleted software', each with an associated checkbox. Below these are 'Find' and 'Clear' buttons.

- ___ 5. Click **Find**.

- ___ 6. Select the **XYZ Server 1.1** in the Search Result section, and click **Assign**.



You are returned to the Create Signature window.



Note: In this exercise, you use the **File signature** type. However, if applicable, you can select other signatures types from the Select signature type list.

- ___ 7. Select **File signature** and click **Next**.



- ___ 8. Enter **xyzserv.exe** in the File name field. This file is the signature file used for the XYZ Server product.
- ___ 9. Enter **5** in the **Size (bytes)** field and select **Software recognition** as the Signature Scope.
- ___ 10. Select **Windows** as Platform and enter **Lab lesson** as Reason of change.



Note: Signatures with a scope of software recognition cannot be used to monitor product use metrics in IBM Tivoli Asset Discovery for Distributed.

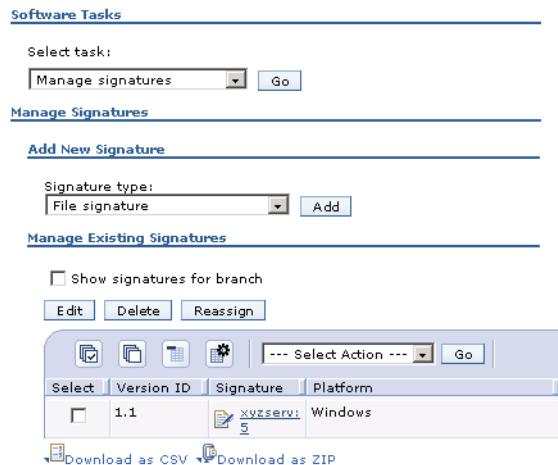
- ___ 11. Click **Create**.

- ___ 12. Close all open tabs.

Exercise 8-23: Viewing existing signatures

This exercise demonstrates how to view the signature that you added in Exercise 8-22, “Adding and assigning a new software signature” on page 8-42.

- ___ 1. Click **IBM Tivoli Software Knowledge Base > Manage Software > Find Software**.
- ___ 2. Enter **XYZ** in the Search by text field and click **Find**.
- ___ 3. Click **XYZ Server** in the Search Results section.
- ___ 4. Click **XYZ Server 1.1** in the Software Hierarchy section.
- ___ 5. Select **Manage signatures** from the Select task list and click **Go**.
- ___ 6. Review the signature.



Note: You can select the signature and edit the attributes.

- ___ 7. Close all open tabs.

Exercise 8-24: Adding licensing attributes to a software product

This exercise demonstrates how to define the licensing attributes for a software item.

- ___ 1. Click **IBM Tivoli Software Knowledge Base > Manage Software > Find Software**.
- ___ 2. Enter **XYZ** in the Search by text field, and click **Find**.

- ___ 3. Click **XYZ Server** in the Search Results section.
- ___ 4. Select **Manage licensing attributes** from the Select task list and click **Go**.



Note: The Software Product is **Licensable** by default. You can also identify that the product is **subcapacity**, **PVU**, and an **IBM IPLA** type license.

- ___ 5. Click **Cancel**.
- ___ 6. Close all open tabs.
- ___ 7. Log out of the console.

In this exercise, you created a software hierarchy for a new software item and identified a recognition signature for it. To use this signature for discovery and license management, you must perform the following steps:

- Publish the catalog
- Import the catalog into IBM Tivoli Asset Discovery for Distributed
- Import the catalog into IBM SmartCloud Control Desk

After you complete these steps, the XYZ Server software records display in the IBM SmartCloud Control Desk software catalog. In IBM Tivoli Asset Discovery for Distributed, the agents periodically check for a new catalog version. If a new version is found, it is downloaded with the new signatures. Because you created a simple product and IBM Tivoli Asset Discovery for Distributed discovers everything as a component, Tivoli Software Knowledge Base Toolkit creates a component with a signature that is attached when the catalog is published. The agent catalog uses this signature to match the file signature.

Exercise 8-25: Managing unmatched registry entries

The IBM Tivoli Asset Discovery for Distributed agent can be configured to perform a native scan. The native scan looks for signatures in the operating system registries that are not found in the software catalog. Periodically, review this list to ensure that it does not include software products that you want to monitor. If you find a product that you want to monitor, you can launch in context to the Software Knowledge Base Toolkit and add the signature. This exercise demonstrates how to add an unmatched registry entry to the Software Knowledge Base Toolkit.

- ___ 1. Log in to the **IBM Tivoli Asset Discovery for Distributed** console as **tipadmin** with the password **object00**.
- ___ 2. Click **Tivoli Asset Discovery > Administration > Import Software Catalog**.

- ___ 3. Enter **<https://vm100.tivoli.edu:12344>** for the web address of the Software Knowledge Base Toolkit and click **Apply**.
- ___ 4. Close the **Import Software Catalog** tab.
- ___ 5. Click **Tivoli Asset Discovery > Software > Unmatched Registry Entries**.
- ___ 6. Review the list of entries. These entries were found by agents using the native scan feature.

| Select | Manufacturer | Registry Entry | Version | Number of Instances | Relevant |
|--------------------------|-----------------------|---|----------|---------------------|----------|
| <input type="checkbox"/> | Microsoft Corporation | Security Update for Windows Server 2003 (KB945553) | 1 | 1 | Yes |
| <input type="checkbox"/> | Microsoft Corporation | Security Update for Windows Server 2003 (KB975560) | 1 | 1 | Yes |
| <input type="checkbox"/> | Microsoft Corporation | Security Update for Windows Media Player 6.4 (KB925398) | | 1 | Yes |
| <input type="checkbox"/> | Microsoft Corporation | Update for Windows Server 2003 (KB948496) | 1 | 1 | Yes |
| <input type="checkbox"/> | Microsoft Corporation | Update for Windows Server 2003 (KB2467659) | 1 | 1 | Yes |
| <input type="checkbox"/> | Microsoft Corporation | Security Update for Windows Server 2003 (KB2296199) | 1 | 1 | Yes |
| <input type="checkbox"/> | Microsoft Corporation | Security Update for Windows Server 2003 (KB924667-v2) | 2 | 1 | Yes |
| <input type="checkbox"/> | Microsoft Corporation | Security Update for Windows Server 2003 (KB2423089) | 1 | 1 | Yes |
| <input type="checkbox"/> | Microsoft Corporation | Update for Windows Server 2003 (KB971737) | 1 | 1 | Yes |
| <input type="checkbox"/> | Microsoft Corporation | Security Update for Windows Server 2003 (KB973507) | 1 | 1 | Yes |
| <input type="checkbox"/> | Igor Pavlov | 7-Zip | 4.65.0.0 | 1 | Yes |

- ___ 7. Click the **7-Zip** registry entry.
- ___ 8. Click the **Add a signature to the knowledge base** link.

Unmatched Registry Entries
Unmatched Registry Entries > Instances

Registry Entry Details

The table below lists instances of the selected entry that is not defined by a filter signature in the software catalog.

| | |
|---|-------------|
| Manufacturer: | Igor Pavlov |
| Registry entry: | 7-Zip |
| Version: | 4.65.0.0 |
| Add a signature to the knowledge base | |

Instances

| Host Name | Installation Path | Operating System | Scan Group |
|-----------|---------------------------------|------------------|------------|
| VM100 | C:\Program Files\7-Zip\7zFM.exe | Windows 2003 5.2 | DEFAULT |

Page 1 of 1 1 Go Rows 1 Total: 1 Filtered: 1

- ___ 9. Log in to the Software Knowledge Base Toolkit console as **KB_Manager** with the password **object00**.
- ___ 10. Review the filter details and click **Next** to continue.
- ___ 11. Enter **7-Zip** in the Software Name field and click **Find**. The software item that you want to assign the signature to must exist in the knowledge base. If it does not exist, you must

create it using the steps covered in Exercise 8-19, “Creating a software product” on page 8-38 through Exercise 8-21, “Adding a variation to the software hierarchy” on page 8-41.

- ___ 12. Select **Igor Pavlov 7-Zip 4** and click **Next**.

| Select | Software | Manufacturer |
|----------------------------------|------------------------|--------------|
| <input type="radio"/> | Igor Pavlov 7-Zip 4.4 | Igor Pavlov |
| <input type="radio"/> | Igor Pavlov 7-Zip 4.42 | Igor Pavlov |
| <input type="radio"/> | Igor Pavlov 7-Zip 3.12 | Igor Pavlov |
| <input type="radio"/> | Igor Pavlov 7-Zip 2.3 | Igor Pavlov |
| <input type="radio"/> | Igor Pavlov 7-Zip 4.15 | Igor Pavlov |
| <input type="radio"/> | Igor Pavlov 7-Zip 2 | Igor Pavlov |
| <input checked="" type="radio"/> | Igor Pavlov 7-Zip 4 | Igor Pavlov |
| <input type="radio"/> | Igor Pavlov 7-Zip 3 | Igor Pavlov |
| <input type="radio"/> | Igor Pavlov 7-Zip | Igor Pavlov |

- ___ 13. Enter **Lab lesson** for the Reason of change and click **Next**.
- ___ 14. Review the changes and click **Finish**.
- ___ 15. Click **OK** to dismiss the signature added message.
- ___ 16. Click **IBM Tivoli Software Knowledge Base > Manage Software > Find Software**.
- ___ 17. Enter **7-Zip** in the Search by text field and click **Find**.
- ___ 18. Click **Igor Pavlov 7-Zip** in the Search Results section.
- ___ 19. Click **Igor Pavlov 7-Zip 4** in the software hierarchy.
- ___ 20. Select **Manage signatures** from the Select task list and click **Go**.

- ___ 21. Review the signature.

The screenshot shows the 'Software Tasks' interface with the 'Manage Signatures' task selected. A warning message at the top states: 'Recognition signatures assigned to this software item will not be exported to the following catalogs: IBM Tivoli Asset Discovery for Distributed 7.2; IBM Tivoli License Compliance Manager 2.3.' Below this, there's an 'Add New Signature' section with a dropdown for 'Signature type' set to 'File signature' and an 'Add' button. The main area is titled 'Manage Existing Signatures' and includes a checkbox for 'Show signatures for branch'. Below this are buttons for 'Edit', 'Delete', and 'Reassign'. A table lists existing signatures, with one entry highlighted: '4' (checkbox), '7-Zip' (signature name), '4.65.0.0' (version ID), and 'Any' (platform). At the bottom are 'Download as CSV' and 'Download as ZIP' links.

- ___ 22. Notice the error indicating that recognition signatures assigned to this item are not exported. Recognition signatures must be assigned to a release or variant level. This signature was assigned to the version level. The correct procedure is to create a release under the version 4 called 4.65. Then, assign the signature to that release level.

- ___ 23. Log out of both consoles.

- ___ 24. Tell your instructor that you are finished with the unit exercises.

Student exercises for Appendix A

Exercise A-1: Using Integration Framework

In this exercise, you use a supplied publish channel to export the disposal details of the 10 assets that you modified in the previous exercise. This information can then be sent to the vendor for confirmation. This exercise is completed on the IBM SmartCloud Control Desk image. If you shut down the image, restart it and start the IBM SmartCloud Control Desk server. If you do not have at least 12 GB of RAM, you might have to shut down the IBM Tivoli Asset Discovery for Distributed image.

Exporting a disposal file to send to a vendor

- ___ 1. Log in to the IBM SmartCloud Control Desk console as **maxadmin** with the password **object00**.
- ___ 2. Click **Integration > Object Structures** in the navigation bar.
- ___ 3. Find and open the **ITASSETDISPOSAL** object structure.

- ___ 4. Review the object structure.



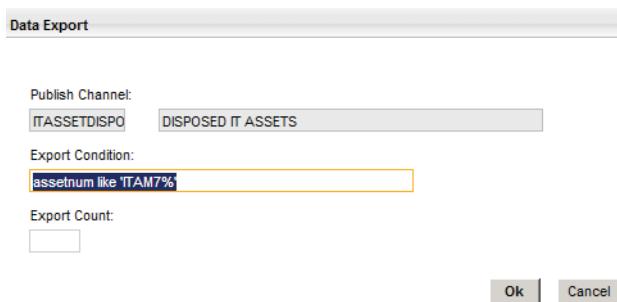
Note: This object structure was first added in version 7.2 for exporting and importing asset disposal detail data. By clicking the **Exclude/Include Fields** under More Actions in the navigation bar, you can review the fields that are included in this object structure.

The screenshot shows the SAP Fiori interface with the title 'Exclude/Include Fields'. The 'Object Structure' dropdown is set to 'ITASSETDISPO' and 'IT Asset Disposal Definition'. The 'Source Objects for ITASSETDISPOSAL' table shows one row for 'ASSET'. The 'Persistent Fields' tab is selected, displaying a list of fields: CHILDREN, DISABLED, CALNUM, TOOLRATE, ITEMNUM, SENDERSYSID, HASLD, SERIALNUM, and TOTALCOST. Each field has a checkbox in the 'Exclude?' column, all of which are checked. At the bottom right are 'OK' and 'Cancel' buttons.

| Field | Exclude? |
|-------------|-------------------------------------|
| CHILDREN | <input checked="" type="checkbox"/> |
| DISABLED | <input checked="" type="checkbox"/> |
| CALNUM | <input checked="" type="checkbox"/> |
| TOOLRATE | <input checked="" type="checkbox"/> |
| ITEMNUM | <input checked="" type="checkbox"/> |
| SENDERSYSID | <input checked="" type="checkbox"/> |
| HASLD | <input checked="" type="checkbox"/> |
| SERIALNUM | <input checked="" type="checkbox"/> |
| TOTALCOST | <input checked="" type="checkbox"/> |

- ___ 5. Click **Go To Applications > Integration > External Systems**.
___ 6. Find and open the **TAMITEXTSYS** system.
___ 7. Click the **Publish Channels** tab.
___ 8. Find and select the **ITASSETDISPOSAL** publish channel.

- ___ 9. Click the **Data Export** button and enter **assetnum** like 'ITAM7%' for the Export Condition.



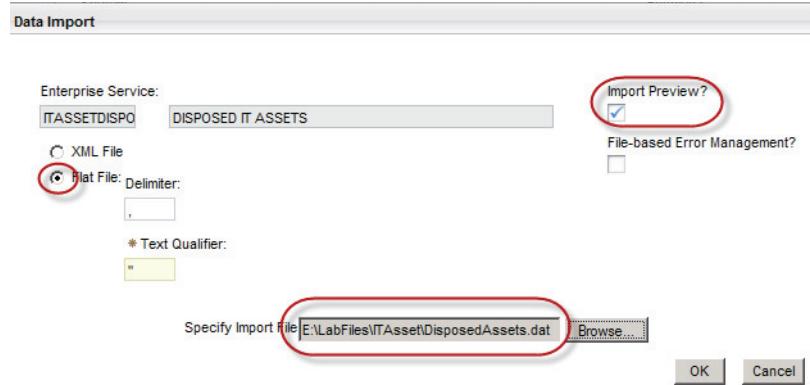
- ___ 10. Click **OK** to start the export.
___ 11. Wait a minute for the export to complete.
___ 12. Minimize Internet Explorer.
___ 13. Open Windows Explorer and change to the **C:\maximo\flatfiles** directory.
___ 14. Open the **TAMITEXTSYS_ITASSETDISPOSALInterface_<generated number>.dat** export file that was created with a text editor such as NotePad.
___ 15. View the contents of the file. If you completed the exercises in unit 6, the ITAM7010 asset shows a status of *disposed* in the file.
___ 16. Close the file.

Importing a disposal file received from the vendor

In this exercise, you import an updated disposal detail file for the 10 assets.

- ___ 1. Change to the **E:\LabFiles\ITAsset** directory.
___ 2. Open the **DisposedAssets.dat** file with a text editor such as NotePad. Notice that information for the other nine leased assets was updated to indicate that they were returned.
___ 3. Close the file.
___ 4. Maximize Internet Explorer.
___ 5. Click the **Enterprise Service** tab.
___ 6. Find and select the **ITASSETDISPOSAL** enterprise service.
___ 7. Click **Data Import**.

- ___ 8. Select the **Flat File** and **Import Preview** options.
- ___ 9. Click **Browse**.
- ___ 10. Find and open the **E:\LabFiles\ITAsset\DisposedAssets.dat** file.



- ___ 11. Click **OK**.
- ___ 12. Review the preview results. There are 10 assets updated in this import.
- ___ 13. Click **OK** to dismiss the preview results.
- ___ 14. Click **Data Import**.
- ___ 15. Select the **Flat File** options. Do *not* select the Import Preview option.
- ___ 16. Click **Browse**.
- ___ 17. Find and open the **E:\LabFiles\ITAsset\DisposedAssets.dat** file.
- ___ 18. Click **OK**.
- ___ 19. Click **OK** to dismiss the system message.
- ___ 20. Wait a few minutes for the import to complete.
- ___ 21. Click **Go to Applications > Assets > Assets**.
- ___ 22. Find the assets that you updated by entering **ITAM7** in the Asset field and pressing Enter.
- ___ 23. Open any asset and click the **IT Details** tab.
- ___ 24. Verify that the status is **Disposed**.
- ___ 25. Scroll to the **End of Life** section.
- ___ 26. Verify that the end of life details are updated.
- ___ 27. Click the **Start Center** icon to return to the All Users start center.

Exercise A-2: Importing the software catalog

This exercise demonstrates how to import the software catalog into IBM SmartCloud Control Desk. There are two methods for importing a software catalog. First, you can directly import the software catalog that is published by IBM. Second, you can connect to the Software Knowledge Base Toolkit and import a published catalog. Both methods are demonstrated in this exercise.



Note: To import the software catalog from the Software Knowledge Base Toolkit, you must have at least 12GB of RAM to run both images.

Importing the IBM software catalog

You can obtain the latest IBM software catalog from the following IBM FTP site:

ftp://public.dhe.ibm.com/software/tivoli_support/misc/CandO/TivoliCatalog/ibm/SwKBT/

A copy of the software catalog is on your image.

- ____ 1. Minimize the console.
- ____ 2. Open Windows Explorer and change to the **E:\LabFiles\ITAsset** directory.
- ____ 3. Right-click the **IBMSoftwareCatalog_canonical_form_20120731.zip** file. This file is a compressed file that contains the software catalog.
- ____ 4. Select **7-Zip > Extract Here** to extract the contents to the current directory.
- ____ 5. Verify that the **IBMSoftwareCatalog_canonical_form_20120731.xml** file is added to the **E:\LabFiles\ITAsset** directory.
- ____ 6. Maximize the console.
- ____ 7. Click **System Configuration > Platform Configuration > Cron Task Setup**.
- ____ 8. Find and open the **SWCATALOGIMPORT** cron task.
- ____ 9. Enter the following information to define the cron task parameters.

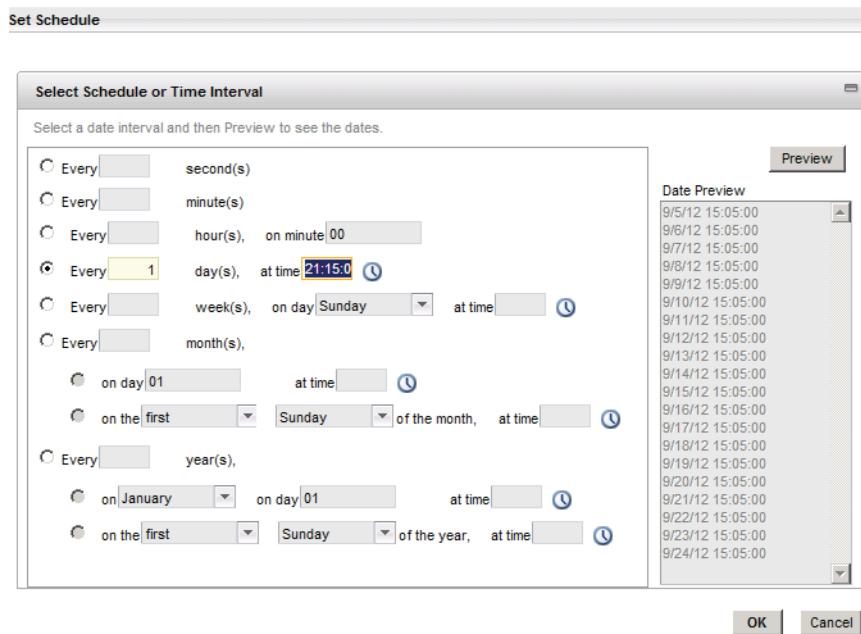
| Parameter | Value |
|--------------|---------------|
| HOSTNAME | [leave blank] |
| PARTIALRUN | 6 |
| PORT | [leave blank] |
| REPOSITORYID | [leave blank] |

| Parameter | Value |
|-----------|--|
| TEMPDIR | E:\\LabFiles\\ITAsset\\ |
| TEMPFILE | IBMSoftwareCatalog_canonical_form_20120731.xml |



Note: The TEMPFILE parameter is on the second page.

- ___ 10. Change the schedule to run **Every 1 day at 5 minutes past the current time** on the image. Check the clock on the image for the current time. For example, if the image time is 9:10 p.m., set the schedule to Every 1 day at 21:15.



- ___ 11. Select **Active** for the SWKBT instance and save the task.
___ 12. Wait five minutes or more for the cron task to start.
___ 13. Click the **History** subtab.

- ___ 14. Verify that the cron task started. Activities are logged when the cron task starts.

The screenshot shows two tables. The top table, 'Cron Task Instances', lists a single entry: SWKBT with a cron schedule of '1d,0,15,21,*,*,*'. The bottom table, 'Cron Task History', shows five log entries for the task. The first entry is labeled 'ACTION' and occurred at 9/4/12 21:10:38. Subsequent entries show 'START', 'STOP', 'START', and 'INIT' events occurring at the same time, indicating the task's execution cycle.

| Cron Task Instances | | | | | | |
|-------------------------|------------------|-------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Cron Task Instance Name | Schedule | Run as User | Active? | Keep History? | Max Number | |
| SWKBT | 1d,0,15,21,*,*,* | MAXADMIN | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Duplic | | | | | | |
| Parameters | History | | | | | |

| Cron Task History | | | | | | |
|-------------------|----------|-----------------|-----------------|-------------|---------------|--|
| Sequence | Activity | Start Time | End Time | Server Name | Server Host | |
| 8 | ACTION | 9/4/12 21:10:38 | 9/4/12 21:10:38 | MXServer | 192.168.1.210 | |
| 7 | START | 9/4/12 21:10:37 | 9/4/12 21:10:37 | MXServer | 192.168.1.210 | |
| 6 | STOP | 9/4/12 21:10:37 | 9/4/12 21:10:37 | MXServer | 192.168.1.210 | |
| 5 | START | 9/4/12 21:10:37 | 9/4/12 21:10:37 | MXServer | 192.168.1.210 | |
| 4 | INIT | 9/4/12 21:10:37 | 9/4/12 21:10:37 | MXServer | 192.168.1.210 | |

- ___ 15. Minimize the console.
___ 16. Open Windows Explorer and change to the E:\LabFiles\ITAsset directory.
___ 17. Verify that SwKBT*.xml files started to be created in the directory.

The screenshot shows a Windows Explorer window with the path 'E:\LabFiles\ITAsset'. The list view displays various files and folders. Three specific XML files are highlighted with a red oval: 'SwKBTManufacturers.xml', 'SwKBTSwPartNumber.xml', and 'SwKBTSoftware.xml'. These files were generated by the cron task as it parsed the IBM software catalog.

| Name | Size | Type | Date Modified |
|--|------------|----------------------|-------------------|
| License | | File Folder | 8/31/2012 12:39 |
| DisposedAssets.dat | 2 KB | DAT File | 8/21/2012 10:21 |
| IBMSoftwareCatalog_canonical_form_20120731.zip | 17,273 KB | Compressed (zippe... | 8/21/2012 10:53 |
| ITIC7501-Win.zip | 21,962 KB | Compressed (zippe... | 8/17/2012 7:48 PM |
| Leased_Assets_Import.csv | 1 KB | CSV File | 8/31/2012 4:20 PM |
| Leased_Assets_Import.ods | 11 KB | OpenDocument Spr... | 8/8/2012 5:43 PM |
| port_replicator_series3.jpg | 8 KB | JPEG Image | 8/3/2012 3:12 PM |
| TAD4D72_75toDPA75.fsn | 68 KB | FSN File | 8/22/2012 4:16 PM |
| TAMIT_BPC_License_Import_for_IBM_Based_Lice... | 330 KB | Adobe Acrobat Doc... | 6/19/2012 6:04 PM |
| TAMIT_BPC_License_Import_for_IBM_Based_Lice... | 43 KB | Compressed (zippe... | 6/19/2012 6:04 PM |
| w510.jpg | 150 KB | JPEG Image | 8/1/2012 10:36 PM |
| xeroxtoner.jpg | 5 KB | JPEG Image | 8/2/2012 9:17 PM |
| IBMSoftwareCatalog_canonical_form_20120731.xml | 117,564 KB | XML Document | 7/20/2012 8:15 AM |
| Readme.txt | 2 KB | Text Document | 7/30/2012 1:59 PM |
| SwKBTManufacturers.xml | 303 KB | XML Document | 9/4/2012 9:12 PM |
| SwKBTSwPartNumber.xml | 10,313 KB | XML Document | 9/4/2012 9:14 PM |
| SwKBTSoftware.xml | 0 KB | XML Document | 9/4/2012 9:14 PM |

The cron task is parsing the IBM software catalog to prepare it for import. After the file is parsed, the cron task imports the individual .xml files. The entire process can take over an hour to complete. As the .xml files are imported, they are removed from the directory. The results can be viewed by opening the Software Catalog application. Because a software catalog was imported into your

environment, it is difficult to see results. However, you can verify that the cron task is complete by reviewing the history. The cron task is complete when the End Time of the Action is updated.

| Cron Task History | | | | | | |
|-------------------|----------|----------|-----------------|-----------------|-------------|---------------|
| | Sequence | Activity | Start Time | End Time | Server Name | Server Host |
| ▶ | 8 | ACTION | 9/4/12 21:10:38 | 9/4/12 22:04:32 | MXServer | 192.168.1.210 |
| ▶ | 7 | START | 9/4/12 21:10:37 | 9/4/12 21:10:37 | MXServer | 192.168.1.210 |
| ▶ | 6 | STOP | 9/4/12 21:10:37 | 9/4/12 21:10:37 | MXServer | 192.168.1.210 |
| ▶ | 5 | START | 9/4/12 21:10:37 | 9/4/12 21:10:37 | MXServer | 192.168.1.210 |
| ▶ | 4 | INIT | 9/4/12 21:10:37 | 9/4/12 21:10:37 | MXServer | 192.168.1.210 |



Important: Do not attempt the import of the software catalog from the Software Knowledge Base Toolkit until this cron task is complete. However, you can start the publishing task in the Software Knowledge Base Toolkit that is detailed in steps 18 - 24. That task also takes approximately an hour.

Importing the software catalog from the Software Knowledge Base Toolkit

If you added your own software and signatures in the Software Knowledge Base Toolkit, you can publish that catalog and import it into IBM SmartCloud Control Desk and IBM Tivoli Asset Discovery for Distributed. Both images must be started to complete the exercise steps in this section.

- ___ 18. Switch to the **IBM Tivoli Asset Discovery for Distributed** image. If you shut down the image, start it.
- ___ 19. If the Software Knowledge Base Toolkit is not started, double-click the **Start Software Knowledge Base Toolkit** shortcut on the desktop.
- ___ 20. Open the web browser, and click the **Software Knowledge Base Toolkit** bookmark.
- ___ 21. Log in to Tivoli Software Knowledge Base Toolkit as **KB_Manager** with the password **object00**.
- ___ 22. Click **IBM Tivoli Software Knowledge Base > Manage Knowledge Base Exports > Publish Catalogs**.
- ___ 23. Click **Publish** to publish the catalog.
- ___ 24. Click **See task details** to view the details of the publish catalog task.



Note: The Publish operation in the lab environment can take an hour or more. This task is asynchronous, which means the console is available for use. You can check the progress of the task by clicking **Refresh**. When the publish task is complete, the task status changes to **Completed**.

The screenshot shows a window titled 'Publish Catalog' with a sub-section 'View Publication Task Details'. It displays the following information:
Owner: KB_Manager
Start date: Saturday, November 19, 2011 7:07:12 AM GMT+05:00
Task status: Completed
Additional information: Knowledge base catalogs were successfully published.
Buttons at the bottom: Refresh and Close.

- ___ 25. Wait for the publish task to complete in the Software Knowledge Base Toolkit.
- ___ 26. Click **Close** to dismiss the publish task.
- ___ 27. Verify that the published catalogs are listed.

The screenshot shows the 'Published Catalogs' section of the Publish Catalog window. It includes:
Published Catalog Attributes:
Knowledge base data version: 7
Published catalog data version: 7
Last catalog publication date: Saturday, November 19, 2011 8:07:56 AM GMT+05:00
Buttons: Publish
Published Catalogs:
Two download links are highlighted with a red oval:
Download IBM Tivoli Asset Discovery for Distributed 7.2 catalog as ZIP
Download canonical XML catalog as ZIP

These catalogs are available for import. There are two different catalogs published. The catalog published for IBM SmartCloud Control Desk is a partial catalog. It contains the software hierarchy, but does not contain the signatures. It does not need the signatures because it does not perform the discovery. The catalog for IBM Tivoli Asset Discovery for Distributed is a complete catalog. It contains the signatures for the agents to perform the discovery.

After the catalog is published in the Software Knowledge Base Toolkit, you can import it into IBM SmartCloud Control Desk by using the same cron task, **SWCATALOGIMPORT**, but with different parameters. You can also import it into IBM Tivoli Asset Discovery for Distributed by using the Import Software Catalog task. For more information about this task, see the following website:

http://pic.dhe.ibm.com/infocenter/tivihelp/v54r1/topic/com.ibm.tad4d75.doc/com.ibm.license.mgmt.admin.doc/t_importing_software_catalogs.html

- ___ 28. Log out of the Software Knowledge Base Toolkit console.
- ___ 29. Switch to the **IBM SmartCloud Control Desk** image.

- ___ 30. Log in to the console as **maxadmin** with the password **object00**.
- ___ 31. Click **System Configuration > Platform Configuration > Cron Task Setup**.
- ___ 32. Find and open the **SWCATALOGIMPORT** cron task.

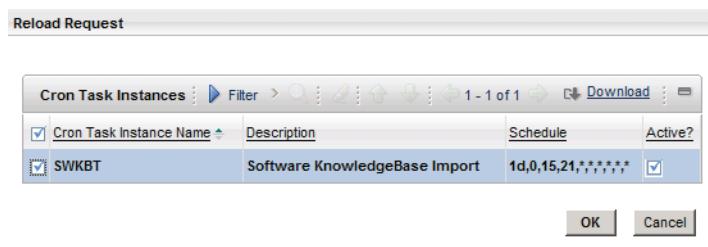


Important: Make sure that the previous software catalog import finished.

- ___ 33. Enter the following information to define the cron task parameters.

| Parameter | Value |
|--------------|----------------------|
| HOSTNAME | 192.168.1.200 |
| PARTIALRUN | 7 |
| PORT | 12344 |
| REPOSITORYID | [leave blank] |
| TEMPDIR | E:\\Temp\\ |
| TEMPFILE | swkbt.xml |

- ___ 34. Change the schedule to run **Every 1 day at 5 minutes past the current time** on the image. Check the clock on the image for the current time.
- ___ 35. Select **Active** for the SWKBT instance and save the task.
- ___ 36. Click **Reload Request** under More Actions in the navigation bar.
- ___ 37. Select the **SWKBT** instance and click **OK**.



- ___ 38. Wait five minutes or more for the cron task to start.
- ___ 39. Click the **History** subtab.
- ___ 40. Verify that the cron task started.
- ___ 41. Minimize the console.

-
- ___ 42. Open Windows Explorer and change to the E:\Temp directory.
 - ___ 43. Verify that **SwKBT*.xml** files started to be created in the directory. It takes approximately an hour for the import to complete.

| Name | Size | Type | Date Modified | Attrib |
|------------------------|-----------|-----------------------|-------------------|--------|
| swkbt.xml | 91,564 KB | XML Document | 9/4/2012 11:15 PM | A |
| swkbt.xml.zip | 15,369 KB | Compressed (zippe...) | 9/4/2012 11:15 PM | A |
| SwKBTManufacturers.xml | 303 KB | XML Document | 9/4/2012 11:15 PM | A |
| SwKBTSwPartNumber.xml | 8,419 KB | XML Document | 9/4/2012 11:16 PM | A |
| SwKBTSoftware.xml | 0 KB | XML Document | 9/4/2012 11:16 PM | A |

- ___ 44. Sign out of the console.

Exercise A-3: Importing discovered data

In this exercise, you define the source data connection for the Tivoli Asset Discovery for Distributed database. You also define the target data connection for Deployed Assets in the Maximo database. Both images must be running for this exercise.

- ___ 1. Click **Start > All Programs > IBM Tivoli > Integration Composer > IBM Tivoli Integration Composer**.
- ___ 2. Log in as **maximo** with the password **object00**.

Defining source and target data sources

You must define data source so that IBM Tivoli Integration Composer knows how to connect to the IBM SmartCloud Control database and the discovery tool database. In this example, the discovery tool database is IBM Tivoli Asset Discovery for Distributed.

Defining the data source connection for the target data

In Integration Composer, define a data source connection for the target of the data to be imported: **Deployed Assets 7.5** (the Maximo database).

- ___ 3. Click **Define New Data Source**.

The Data Schema page is displayed in the Define New Data Source window.



Note: The Data Schema page lists data schemas that were installed with Integration Composer. It also lists data schemas that were created by using database scripts or the data schema feature in Integration Composer.

- ___ 4. Select **Deployed Assets 7.5** as your target data schema, and click **Next**.
- ___ 5. In the Data Source field, enter **ControlDesk** for the data source (must have at least two characters and is case-sensitive).
- ___ 6. Click **Next**. The connection information fields are displayed.
- ___ 7. Enter the following information for the target data source.

| Field | Value |
|-------------------|----------------------------|
| Connection Method | IBM DB2 JDBC DRIVER |
| Host Name | 192.168.1.210 |
| Host Port | 50005 |
| Database | MAXDB75 |
| User Name | maximo |
| Password | object00 |
| Table Owner | maximo |

Define a New Data Source

1 Data Schema 2 Data Source 3 Connection Information

Connection Method: IBM DB2 JDBC Driver

Host Name: 192.168.1.210
Host Port: 50005
Database: maxdb75
User Name: maximo
Password: *****
Table Owner: maximo

Bidi Layout Format Clear Test Connection

Back Next Finish Cancel

- _____ 8. Click **Test Connection** to test the connection to the data source. If the connection fails, verify that the **DB2 - DB2COPY1 - CTGINST1-0** instance is started. Also, verify that you enter the correct values for the parameters.



Note: In an IBM SmartCloud Control Desk implementation, you can find the JDBC path in the **maximo.properties** file. This path includes the host name, port number, and database name for the installation.

- _____ 9. Click **OK** to dismiss the Test succeeded message.
_____ 10. Click **Finish**.
_____ 11. Click **OK** to dismiss the Data Source saved successfully message.

Defining the data source connection for the source data

In Integration Composer, define a data source connection for the source of the data to be imported. In this example, the source is **Tivoli Asset Discovery for Distributed**.

- _____ 12. Click **Define New Data Source**.

The Data Schema page is displayed in the Define New Data Source window.



Note: The Data Schema page lists data schemas that were installed with Integration Composer. It also lists data schemas that were created by using database scripts or the data schema feature in Integration Composer.

- _____ 13. Click **Tivoli Asset Discovery for Distributed 7.2/7.5** as your target data schema, and click **Next**.
_____ 14. In the Data Source field, enter **TADD** for the data source (must have at least two characters and is case-sensitive).
_____ 15. Click **Next**.
The connection information fields are displayed.

| Field | Value |
|-------------------|----------------------------|
| Connection Method | IBM DB2 JDBC DRIVER |
| Host Name | 192.168.1.200 |
| Host Port | 50000 |
| Database | TLMA |

| Field | Value |
|-------------|----------------------|
| User Name | Administrator |
| Password | object00 |
| Table Owner | ADM |

- ___ 17. Click **Test Connection** to test the connection to the data source. If the connection fails, verify that you can ping the IBM Tivoli Asset Discovery for Distributed image (ping **192.168.1.200**). If you cannot ping the server, verify that it is started. If you can ping the server, verify that the **DB2 - DB2COPY1 - DB2-0** service is started on the IBM Tivoli Asset Discovery for Distributed image.
- ___ 18. Click **OK** to dismiss the Test succeeded message.
- ___ 19. Click **Finish**.
- ___ 20. Click **OK** to dismiss the Data Source saved successfully message.

Creating a mapping

In this exercise, you create a mapping for the IBM Tivoli Asset Discovery for Distributed data to be import into the Deployed Assets 7.5 table. You import a mapping file called **TAD4D72_75toDPA75.fsn**, and save the mapping.

- ___ 21. Click **Create New Mapping**.
The New Mapping window is displayed.
- ___ 22. From the Source list of available data sources, select the **TADD** data source.
- ___ 23. From the Target list of available data sources, select **ControlDesk** (the Deployed Assets database).
- ___ 24. In the Mapping Name field, enter **TADDtoControlDesk**.
- ___ 25. Click **OK**.
- ___ 26. Enter the password **object00** and click **Finish** to connect to both databases again.



Note: You are prompted again for connection information to reestablish a connection because the connections to the database were closed.

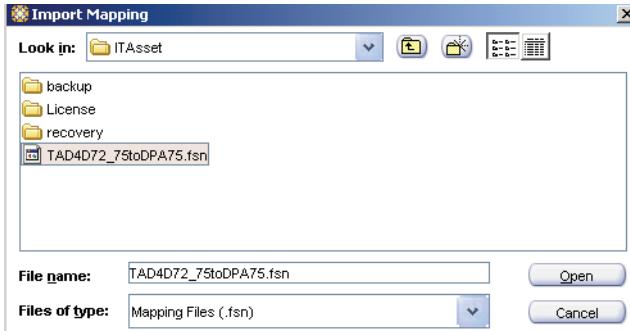
- ___ 27. In the Integration Composer Mapping window, click **Select Action > Import**.

When you select **Import** from the Select Action menu, by default, Integration Composer points to the **mappings** subdirectory. If you store the **.fsn** file in a different location, you can use the browse

feature in this window to locate the file. The **.fsn** extension identifies Integration Composer files. An updated **TAD4D72_75toDPA75.fsn** is provided for you.

- ___ 28. Browse to **E:\LabFiles\ITAsset**.
- ___ 29. Select the mapping file **TAD4D72_75toDPA75.fsn** and click **Open**.

Integration Composer imports the mapping file.



Note: If errors occur when you import the mapping, a window displays the errors. The message asks if you want to continue to import the mapping. To respond, click **Yes** to continue to import the mapping. Integration Composer imports the mapping and shows errors in red. Resolve the errors before saving the mapping. In your lab, there must be no errors in red. The errors in green are warnings and must be repaired when you click **Yes**.

- ___ 30. Drill down in the Source and Target navigation panes to view the structure of the source and target data.

The mapping file that you imported supplied the expressions and mappings to build the target data from the source data.

The mapping files that are supplied with the IBM Tivoli Integration Composer have the expressions and mappings that are required to build the data in Deployed Assets (Computers, Deployed Software, Network Printers, and Network Devices). You can modify or add to these expressions by using the Expression Builder.

- ___ 31. Click **Select Action > Save** to save the mapping definition.
- ___ 32. Click **Select Action > Close** to close the mapping definition.
- ___ 33. Click **Yes** to confirm the closing of the mapping.
- ___ 34. Sign out of IBM Tivoli Integration Composer.

Running a mapping

You created source and target database connections and imported the mapping file to transform the source data to Deployed Assets. In this exercise, you run a command that references the IBM Tivoli Integration Composer components that you created to transform and import the data.

- ___ 35. Open Windows Explorer.
- ___ 36. Change to the **C:\Integration Composer\bin** directory
- ___ 37. Open **executeMapping.properties** by using a text editor such as WordPad or NotePad.
- ___ 38. Use the following information to define the parameters:

```
MAPPINGNAME=TADDtoControlDesk
REPOSITORYUSER=maximo
REPOSITORYPWD=object00
SOURCEUSER=Administrator
SOURCEPWD=object00
TARGETUSER=MAXIMO
TARGETPWD=object00
```

- ___ 39. Save the file as **TADDtoControlDesk.properties** to the **C:\Integration Composer\bin** directory.
- ___ 40. Close the text editor.
- ___ 41. Open a command prompt.
- ___ 42. Change to the **C:\Integration Composer\bin** directory.
- ___ 43. Run the command **executeMapping -f TADDtoControlDesk.properties**.
- ___ 44. Wait for the script to complete.

```
cn Command Prompt - executeMapping -f TADDtoControlDesk.properties
Deployed Asset: Assetclass:COMPUTER Domainname:UNKNOWN Nodename:NODE_95 Tloamhas
h:0KL9JfY7c4Trym146H9SU==
05 Sep 2012 01:50:52:219 [INFO]
=====
    Mapping execution completed
    Mapping: TADDtoControlDesk
    Execution time: 00:02:36
    Deployed Assets created: 150
    Records created: 27674
    Records updated: 0
    Records deleted: 0
    Errors: 0

    NPS GUIDs created: 150
    NRS errors: 0
    NRS records updated on Alternate Keys: 0
    NRS records found as duplicate: 0
    NRS records deleted because of duplicate: 0
    NRS warnings due to duplicate data: 0

=====
Done
Mapping completed successfully.
Integration Composer has finished.
Press any key to continue . . .
```

- ___ 45. Press Enter to continue.
- ___ 46. Close the command prompt.



Note: : The imported data can now be viewed in the Deployed Assets module.

- ____ 47. Log in to the IBM SmartCloud Control Desk console as **maxadmin** with the password **object00**.
- ____ 48. Click **Assets > Deployed Assets > Computers**.
- ____ 49. Enter **Node** in the Computer filter field and press Enter to view a list of the imported computers.
- ____ 50. Sign out of the console.

Exercise A-4: Importing Passport Advantage licenses

To simplify the process of adding license records for your Passport Advantage licenses, you can use an offering in the Integrated Service Management Library to import the definitions from a flat file. The offering is called **License Import for IBM Based Licenses best practice content for IBM Tivoli Asset Management for IT**. This offering works on IBM SmartCloud Control Desk even though it was originally developed for **IBM Tivoli Asset Management for IT**.

A guide is provided with the package about how to install the package and the flat file format that is required for the import to work.



Note: The Integrated Service Management Library can be accessed at <https://www-304.ibm.com/software/brandcatalog/ismlibrary/>. The license import offering can be accessed at <https://www-304.ibm.com/software/brandcatalog/ismlibrary/details?catalog.label=1TW10MA33>.

Installing the License Import for IBM Based Licenses package

- ____ 1. Click **Start > All Programs > IBM WebSphere > Application Server Network Deployment V7.0 > Profiles > ctgDmgr01 > Start the deployment manager**. The deployment manager must be started to deploy the package.
- ____ 2. Open the **IBM SmartCloud Control Desk** folder on the desktop.
- ____ 3. Double-click the **Process Solution Installer - SMP** shortcut.



Note: If you do not have an **IBM SmartCloud Control Desk** folder on your desktop, you can open Windows explorer and run **C:\IBM\SMP\bin\solutionInstallerGUI.bat**.

- ___ 4. Select **English** and click **OK**.
- ___ 5. Click **Next** to continue past the welcome screen.
- ___ 6. Click **Choose** and change to the **E:\LabFiles\ITAsset** directory.
- ___ 7. Select the **TAMIT_BPC_License_Import_for_IBM_Based_Licenses_PPA.zip** file and click **Open**.
- ___ 8. Click **Next** to continue.
- ___ 9. Wait for the package to be validated.
- ___ 10. Review the validation results and click **Next**.
- ___ 11. Enter **object00** for the password and click **Next**.
- ___ 12. Wait for the Middleware credentials to be validated. If validation fails, ensure that the deployment manager started when you performed Step 1.
- ___ 13. Click **Next** to continue past the package options.
- ___ 14. Wait for the system check to complete. This step can take a couple of minutes to complete.
- ___ 15. Click **Next** to continue past the pre-install summary.
- ___ 16. Wait for the deployment to complete. This step can take approximately 1 hour and 20 minutes.
- ___ 17. Click **Next** to continue past the package successfully deployed.
- ___ 18. Click **Next** to continue past the install another package.
- ___ 19. Wait for the installer to close.
- ___ 20. Click **Start > All Programs > IBM WebSphere > Application Server Network Deployment V7.0 > Profiles > ctgDmgr01 > Stop the deployment manager**.
- ___ 21. Enter **wasadmin** for the user name and **object00** for the password when prompted for the credentials. If you are not prompted for the credentials and the deployment manager script closes, repeat step 20 to ensure that the deployment manager stops.

Reviewing the flat file for import

- ___ 22. Open Windows Explorer.

- ___ 23. Change to the **E:\LabFiles\ITAsset** directory.
- ___ 24. Open the **TAMIT_BPC_License_Import_for_IBM_Based_Licenses_PPA.pdf** file.
This file is the guide that is included with the package.
- ___ 25. Review **appendix A** and **appendix B** to see the flat file requirements.
- ___ 26. Close the **.pdf** file.
- ___ 27. Change to the **E:\LabFiles\ITAsset\License** directory.
- ___ 28. Open the **acustomerppadata.csv** file with a text editor.
- ___ 29. Review the contents.



Note: If you need to include an ampersand (&) in any field, you must escape this character with **amp;**. The demonstration file provides an example of this syntax.

```
acustomerppadata.csv - Notepad
File Edit Format View Help
// Make sure GL account matches the one used with the org/company specified in the cron task.,,,,
// Partnumber needs to match the TAMITSWPRNUM, PARTNUMBER, , , , , ,
// Also, the software with that PARTNUMBER needs to exist in the TLOAMSOFTWARE tbl, , , , ,
PARTNUMBER,STARTDATE,TERMINATEDATE,CAPACITY,DESCRIPTION,COMPPERIOD,LICENSENAME,LICENSENUM,IGNOREDCOLUMN,GLACCOUNT
>03LQLL,2012-01-01T12:00:00,2013-10-07T12:05:42-04:00,100,TSAMPXDRSZPVU LIC+S&amp;S 12
10,Daily,TSAMLicense,,Ignoredvalue,1234-567-890
>03LTLL,2012-01-01T12:00:00,2013-10-07T12:05:42-04:00,100,WTXLCHRAGAIZ LIC+S&amp;S 12
10,WTXLlicense,,Ignoredvalue,1234-567-890
>03M5LL,2012-01-01T12:00:00,2013-10-07T12:05:42-04:00,500,STADVAUTHUSER LIC+S&amp;S 12
10,Daily,STADVLicense,,Ignoredvalue,1234-567-890
>03M7LL,2012-01-01T12:00:00,2013-10-07T12:05:42-04:00,300,WTXEDIFACTAIZ LIC+S&amp;S 12
10,WTXEDLlicense,,Ignoredvalue,1234-567-890
```

- ___ 30. Close the text editor.

Scheduling the cron task

- ___ 31. Log in to the console as **maxadmin** with the password **object00**.
- ___ 32. Click **System Configuration > Platform Configuration > Cron Task Setup** in the navigation bar.
- ___ 33. Find and open the **PPAIMPORT** cron task. This task was added during the package installation.
- ___ 34. Enter the following information for the task.

| Parameter | Value |
|-----------|-------|
| Company | IBM |

| Parameter | Value |
|--------------|----------------------------------|
| Directory | E:\\LabFiles\\ITAsset\\License\\ |
| Organization | PMSCIBM |

- ___ 35. Select the **Active** option for the PPAIMPORTINST instance and change the Schedule to every **5** minutes.

The screenshot shows two related screens from the IBM SmartCloud Control Desk interface:

- Cron Task Instances:** This screen lists a single task named "PPAIMPORTINS". The "Schedule" field is set to "5m,*-*-*-*-*". The "Run as User" field is set to "MAXADMIN". The "Active?" checkbox is checked, and the "Keep History?" and "Max Number of History Records" fields are also checked. The value "100" is entered in the "Max Number of History Records" field. Buttons for "Duplicate" and "New Row" are visible at the bottom.
- Cron Task Parameters:** This screen displays parameters for the selected task. It includes columns for "Parameter", "Value", and "Description". The parameters listed are:
 - COMPANY: Value IBM; Description: Company to use when creating a license.
 - DELIMITER: Value ,; Description: The character used to separate values in a row. Typically this
 - DIRECTORY: Value E:\\LabFiles\\ITAsset\\License\\; Description: The directory on the application server to poll for files to import.
 - ORGANIZATION: Value PMSCIBM; Description: Organization to use when a license is created.
 - STATUS: Value ACTIVE; Description: Status to use when a license is created.

- ___ 36. Click the **Save Cron Task** icon.
- ___ 37. Click **Reload Request** under More Actions in the navigation bar.
- ___ 38. Select the **PPAIMPORTINST** instance and click **OK**.
- ___ 39. Wait 5 - 10 minutes for the cron task to run.
- ___ 40. Click **Go To Applications > Assets > Licenses**.
- ___ 41. Press Enter to retrieve a list of all licenses.

- _____ 42. Verify that there are three new licenses. These licenses were included in the import file.

| License | Description | Status | Terminate Date | Vendor | Customer | Capacity | Capacity Unit | Available Capacity |
|----------|--|--------|----------------|-----------|----------|----------|---------------|--------------------|
| ITAM1008 | PVU License for IBM WebSphere Application Server Network Deployment | ACTIVE | | IBM | | 700 | VALUNITS | 700.00 |
| ITAM1014 | PVU Base: IBM DB2 Enterprise Server Edition CPU Option | ACTIVE | | IBM | | 200 | VALUNITS | 200.00 |
| ITAM1009 | PVU License for IBM DB2 Workgroup Server Edition CPU Option | ACTIVE | | IBM | | 1,000 | VALUNITS | 1,000.00 |
| ITAM1010 | PVU License for IBM WebSphere MQ | ACTIVE | | IBM | | 2,500 | VALUNITS | 2,400.00 |
| ITAM1011 | Processor Core License for MS SQL 2005 | ACTIVE | | COMPDEPOT | | 4 | PROCCORE | 4.00 |
| ITAM1013 | Installed Instance License Symantec Norton AntiVirus Corporate Edition | ACTIVE | | COMPDEPOT | | 14 | INSTINST | 14.00 |
| ITAM1012 | Installed Instance License for Adobe Acrobat | ACTIVE | | COMPDEPOT | | 5 | INSTINST | 5.00 |
| ITAM1015 | Installed Base: Microsoft SQL Server 7 Standard Edition | ACTIVE | | COMPDEPOT | | 3 | INSTINST | 3.00 |
| 1004 | PVU Full Capacity Based License: WebSphere Portal Server | ACTIVE | | IBM | | 800 | VALUNITS | 400.00 |
| 1008 | TSAMPXDRSZPVU LIC+S&S 12 MO | ACTIVE | 10/7/13 | IBM | | 100 | VALUNITS | 100.00 |
| 1005 | WTXLCHRAGAIZ LIC+S&S 12 MO | ACTIVE | 10/7/13 | IBM | | 100 | INSTINST | 100.00 |
| 1006 | WTXEDIFACTAIZ LIC+S&S 12 MO | ACTIVE | 10/7/13 | IBM | | 300 | INSTINST | 300.00 |

- _____ 43. Open one of the licenses and review the details. The capacity unit is pulled from the software catalog based on the part number in the import file. If a part number defined in the import file does not exist in the software catalog, that entry is not imported.

- _____ 44. Sign out of the console.



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