



## Reference Guide

### Chapter 3: AssetAgent Advanced Features

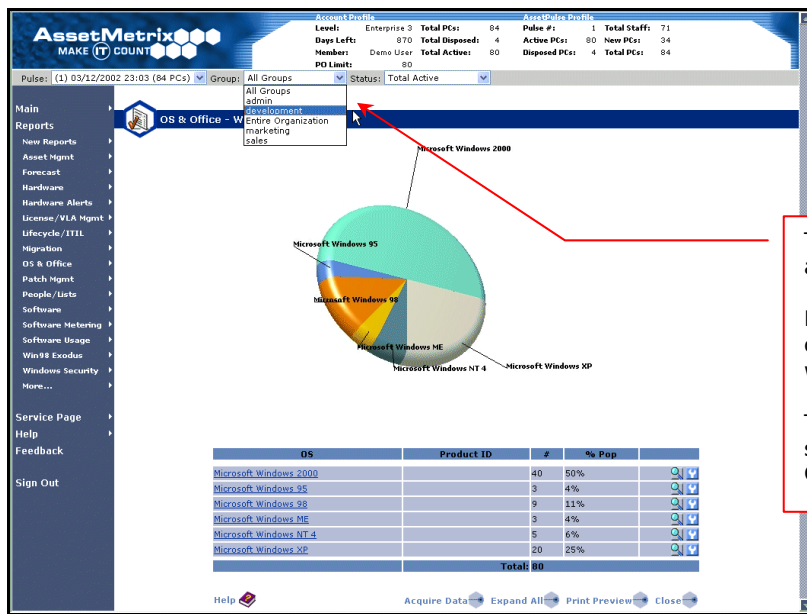
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# Groups

AssetMetrix has a 'built in' way of emulating organization units or groups within your company, whether those groups are defined by departments (sales, marketing, HR, etc.) or a geographic locales (countries, states, cities, branch offices etc.). The Group Name is used to associate an inventoried PC with a pre-defined Group. By default, groups are not mandatory but will simplify the task of filtering your inventory data should you wish to see data for only one particular group at a time.

By using groups, you can drill-down from any report to compare that report's results between one group and another, or between a group and the entire company

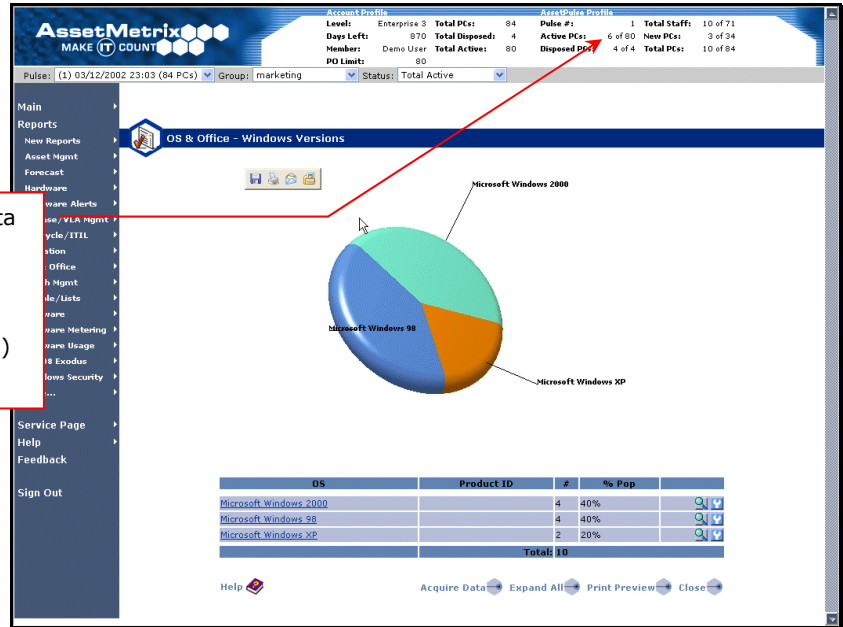
## Example:



The Groups pull-down menu is selectable for all Reports.

By default, reports show the aggregate data of all PCs (All Groups or Entire Organization) whether you've deployed groups or not.

To see the report data from a specific group, simply select the appropriate group from the Group pull-down menu



When a group is selected, the chart and data are dynamically re-calculated.

Notice that the Pulse Stats now show you both the values of that particular group compared to the account totals (i.e. 6 of 80)

### Setting up 'Groups' with AssetMetrix

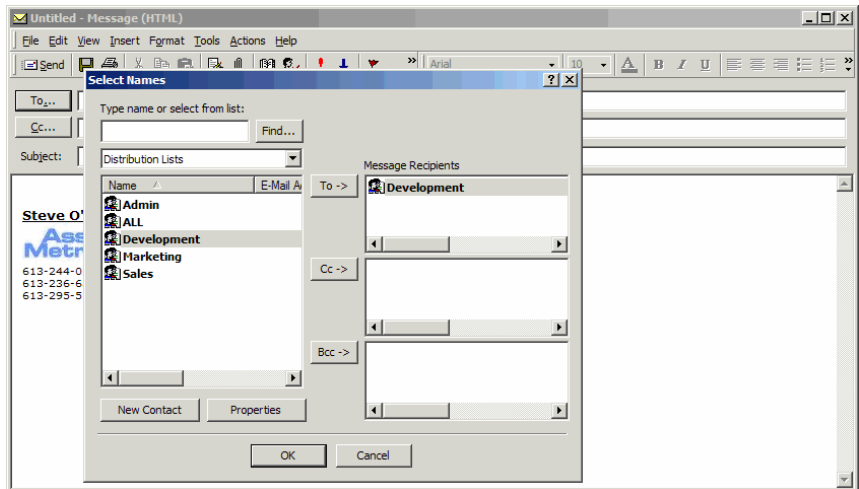
The Group function works under the assumption that each person in the company corresponds to only one group that you are creating (such as Department based group – Sales, Marketing, HR, or locale based group– Dallas, Chicago, Philadelphia). It is not advisable to create groups where a person could belong to 'multiple groups' (i.e. Sales and Marketing). The Groups function is available for Email, LAN and Disk based AssetAgents.

### Creating 'Groups' with the Email-AssetAgent

Email-AssetAgents can easily help you define departments by emulating existing distribution lists within your corporate email application.

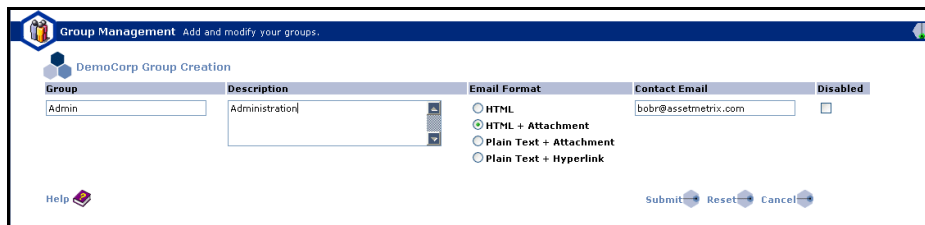
Most corporations create distribution lists (within Exchange, Notes, etc.) to broadcast certain emails to certain departments (sales, marketing, etc.) (see screenshot on right).

With AssetMetrix you can create a special Email-AssetAgent for each one of the 'departments' or 'groups' that you have within your company.

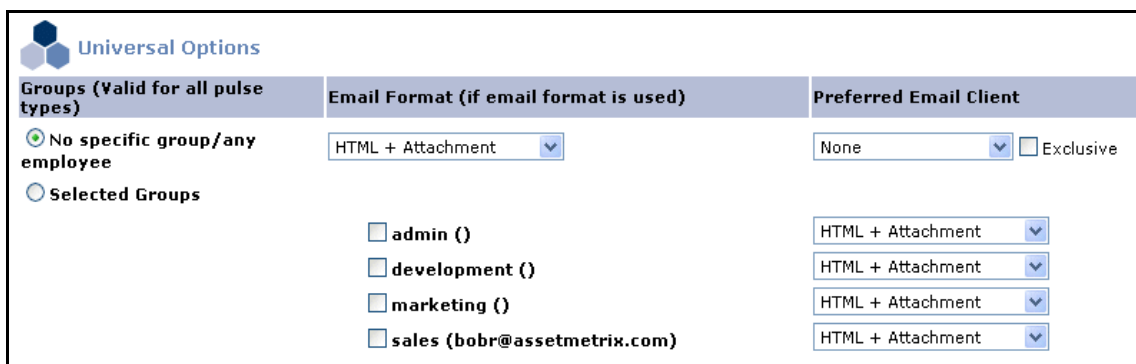


**Here's how:**

- 1) From your corporate email list(s), determine which lists properly represent your 'departments' (remember that every person should be represented once in the chosen mail lists. In the example above, you would exclude the ALL list)



- 2) From the *Group Management* section in your AssetMetrix account (located towards the bottom of the *AssetPulse* page), create a group with an identical or similar name for each corporate email list name that you have.
- 3) From the *AssetPulse* section, create a new AssetPulse. Notice that all of the groups are now displayed and that you can choose between 'No Specific Group' and 'Selected Groups'. Selecting "No Specific Group" will combine all computers together into one main listing called "Entire Organization". Computers cannot be manually added to or moved from a group. Only the AssetAgent can add a computer to a group or move a computer from one group to another. Changes to a computer's current group can only be initiated by deploying a new AssetPulse number.
- 4) Choose 'Selected Groups' and click on the SEND button. You will then receive an AssetPulse email for each group that you have selected. Each group specific email should then be forwarded to its corresponding corporate email list. (Note: by default the system always sends the AssetPulse emails to the Account Contact but can be configured to send to individual Group contacts in order to facilitate the deployment of the AssetPulse. Adding a "Contact Email" address for each group will redirect the AssetPulse email to that individual).



**Tip:** If you don't have mail lists available in your corporate email application –or you don't think that the email lists are up to date - you can forward each group's AssetPulse email to the respective department manager for that group.

If your infrastructure's security settings won't permit the use of the Email-AssetAgent you can also use the groups feature with the LAN-AssetAgent and Disk-AssetAgent (see next section).

### **Creating 'Groups' with the LAN-AssetAgent**

Using groups with the LAN-AssetAgent (and Disk-AssetAgent) can help you identify LAN-based groups such as particular sites (i.e. Dallas or Chicago) or can assist in identifying Departments if your login scripts can determine the department of the end-user via NDS (Novell Directory Services), AD (Active Directory) or other organization unit methodologies.

As described in the previous section, ensure that the required group names are entered in the *Group Management* section.

From the *AssetPulse* section, select the groups required, choose the LAN-AssetAgent (and appropriate options) then click SEND. You will receive an email – with an attached configuration file called NETAMX.AMC and a link to download the DAGENT.ZIP ('Scan Only' executable) or NETAGENT.ZIP ('Install and Scan' or 'Install Only' executable) – for each group that you selected.

### **Identifying server-based groups via several LOGIN servers**

From the corresponding LAN-AssetAgent email, place the DAGENT.EXE and NETAMX.AMC files in a public folder on the server and modify the server's login script to execute DAGENT.EXE.

For example:

```
@\\Inventory\DAGENT.EXE
```

### **Identifying 'Departments' via the same LOGIN server**

This method assumes that your login server can determine the NDS, AD 'group' of a user when they login to the server.

#### **Here's how:**

On the login server, create a different folder for each group that you intend to use. Place the corresponding DAGENT.EXE and NETAMX.AMC files in the appropriate folder.

Modify your login script so that the NDS or AD group name (most likely *Organization Unit -OU*) is determined for each user.

Have the login script launch the DAGENT.EXE from the corresponding folder name;

For example:

```
IF MEMBER OF "MARKETING"  
@\\Inventory\marketing\DAGENT.EXE
```

```
IF MEMBER OF "SALES"  
@\\Inventory\sales\DAGENT.EXE
```

\* NDS= Novell Directory Services, AD = Active Directory.

### **Options for the Disk-AssetAgent**

# AssetAgent Options

The Email, Disk and LAN AssetAgents can be configured with the following advanced options;

## Deploy Survey Form:

When selected, the AssetAgent will display a Survey Form on the end-user's screen. The end-user can then enter their Name, Email address, Location, Building, Mailstop, Phone number, Floor, Network Port ID, Fax number and PC Asset Tag number. The Survey Form is available in 7 languages. For complete details, please see the [Survey Form Implementation Guide](#)

## Single User/PC Mode:

The AssetAgent can be instructed to inventory only one user per PC per AssetPulse. This will result in the first person who receives the AssetAgent being included as the only user for that PC. (Note: applicable to environments where users have local admin rights).

## Output SMS - MIF:

The AssetAgent can now create a Microsoft MIF file on the inventoried PC for use with Microsoft's SMS and other network management products that accept the MIF data format. If selected, the MIF file is created in a C:\WINDOWS\MS\SMS\NOIDMIFS folder. MIF creation is not available with the Linux-AssetAgent.

## Search Custom Registry Entries:

The AssetAgent can be instructed to retrieve custom Windows Registry values. The account administrator can enable this option to retrieve data values in the Registry if Custom Registry Entries have been created for the account. See the Custom Registry Settings section below for more details.

## Show Progress Window:

The AssetAgent can be instructed to display the progress of the PC's Inventory. The progress window will disappear once the inventory has been completed. This feature is useful for users running the Email AssetAgent as they can be instructed to close the email or Internet Browser when the Progress Window closes.

AssetAgents		
<b>Email - AssetAgent</b>	<b>Delivery Method</b>	<b>Options</b>
<input type="checkbox"/> Use Email AssetAgent	<input checked="" type="radio"/> Send to AssetMetrix (via Email Client, SMTP, HTTP) <input type="radio"/> Send to AssetMetrix (via SMTP or HTTP)	<input type="checkbox"/> Deploy <a href="#">Survey Form</a> <input type="checkbox"/> <a href="#">Single User/PC Mode</a> <input type="checkbox"/> Output <a href="#">SMS</a> - MIF <input type="checkbox"/> Search <a href="#">Custom</a> Registry Entries <input type="checkbox"/> Show Progress Window
<b>LAN - AssetAgent</b>	<b>Delivery Method</b>	<b>Options</b>
<input type="checkbox"/> Use Network Agent <input checked="" type="radio"/> Scan Only <input type="radio"/> Install and Scan <input type="radio"/> Install Email Agent Only (no inventory)	<input checked="" type="radio"/> Send to AssetMetrix (via Email Client, SMTP, HTTP) <input type="radio"/> Send to AssetMetrix (via SMTP or HTTP) <input type="radio"/> Write to file	<input type="checkbox"/> Deploy <a href="#">Survey Form</a> <input type="checkbox"/> <a href="#">Single User/PC Mode</a> <input type="checkbox"/> Output <a href="#">SMS</a> - MIF <input type="checkbox"/> Search <a href="#">Custom</a> Registry Entries <input type="checkbox"/> Show Progress Window
<b>Disk - AssetAgent</b>	<b>Delivery Method</b>	<b>Options</b>
<input type="checkbox"/> Use Disk Agent (Scan Only)	<input checked="" type="radio"/> Send to AssetMetrix (via Email Client, SMTP, HTTP) <input type="radio"/> Send to AssetMetrix (via SMTP or HTTP) <input type="radio"/> Write to file	<input type="checkbox"/> Deploy <a href="#">Survey Form</a> <input type="checkbox"/> <a href="#">Single User/PC Mode</a> <input type="checkbox"/> Output <a href="#">SMS</a> - MIF <input type="checkbox"/> Search <a href="#">Custom</a> Registry Entries <input type="checkbox"/> Show Progress Window

# Custom Registry Settings

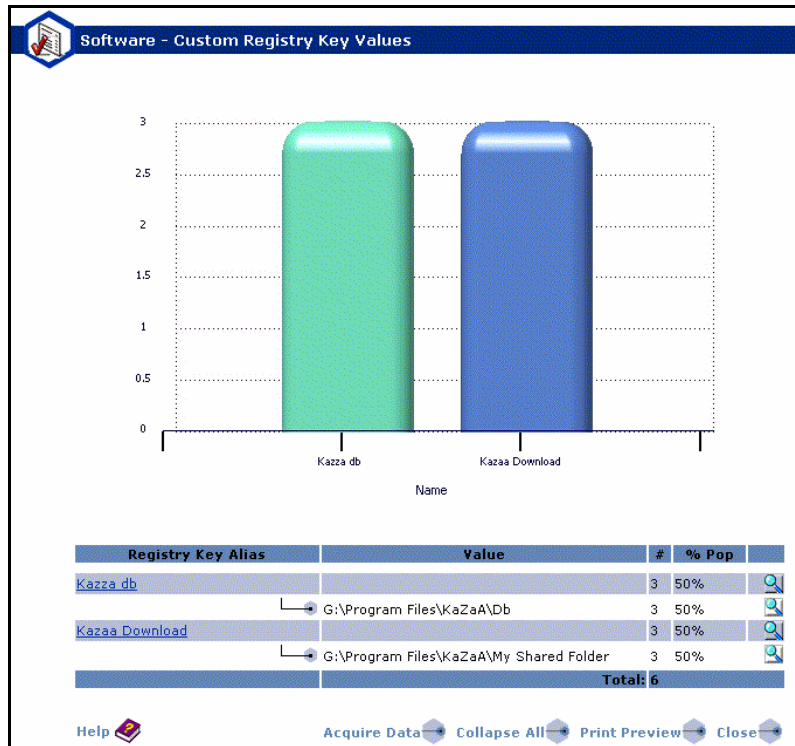
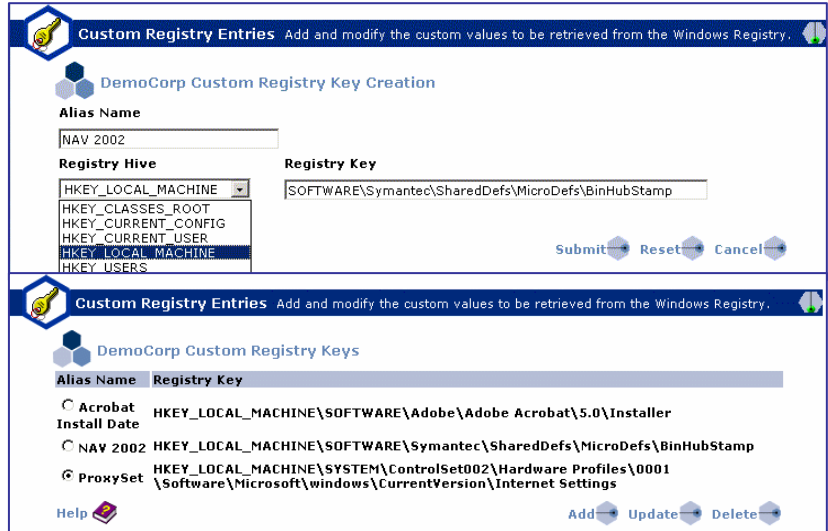
The AssetAgent can be instructed to return specific values within the MS-Windows "Registry", the data file that typically contains values and parameters for all Windows functions and 3<sup>rd</sup> party applications.

The *Custom Registry Entries* Section can assist in finding values or parameters that the AssetAgent doesn't automatically determine.

By applying various parameters in the *Custom Registry Entries* section, you can 'instruct' the AssetAgent to look for and retrieve 'key values' from the registry. The AssetAgent will only 'read' the end-users Registry - it will not modify the registry.

The AssetAgent will look for as many *Registry Key* entries as you have entered.

**Note:** to enable this feature you must select "Search Custom Registry Entries" from the AssetPulse Options section prior to requesting your Pulse.



The returned data will be found in the *Custom Registry Key Values* report, located under the 'More...' menu link, in the 'Misc' report category. Custom registry key values will also be displayed in each PC's detailed information.

**Note:** This feature assumes that you are familiar with the structure of the Windows Registry and of the specific key value that you are looking for. Some software may create different registry key entries based upon the Operating System, the version of the software or numerous other factors. Review technical documentation for the software – or contact your software vendor- for a complete understanding of registry entries created by the software.

**DO NOT** attempt to read or edit the Windows Registry file if you are not familiar with it.



## Update Policy Manager

### Understanding Microsoft's Automatic Update Services

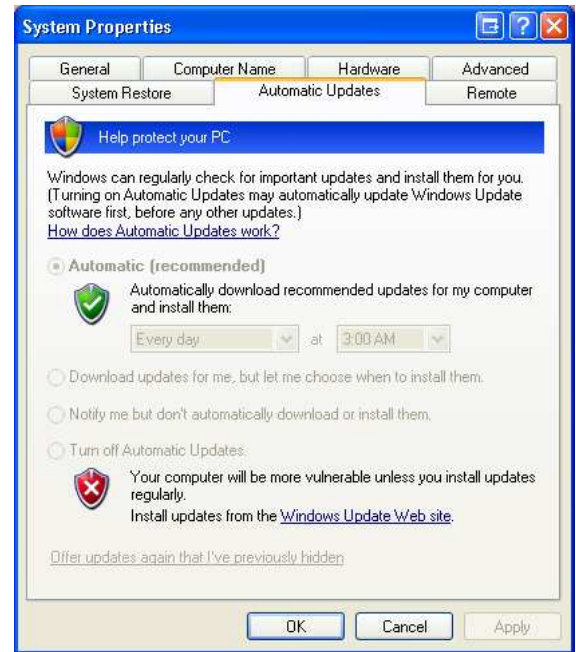
In order to ensure the timely delivery of critical updates, Microsoft has made 'Update Services' freely available through the use of software called 'Automatic Update' where PCs can receive and install updates based upon the current configuration of their Operating System.

Automatic Update (AU) is built into Windows XP, and also available for Windows 2000 and Windows Server 2003 (AU is not available for Windows NT, ME, 98 or 95). With AU, computers can receive updates to Microsoft products either directly from Microsoft's Windows Update Service (WUS) or via an internal corporate server that has installed Microsoft's Software Update Service (SUS).

With Windows XP, a PC's AU settings can be reviewed by right-clicking on the 'My Computer' icon on your desktop, and selecting 'Properties' and then the 'Automatic Update' tab. For Windows 2000, Automatic Update settings can be found in the Control Panel.

In general, if these settings are grayed out (as seen in this example) it suggests that the PC's selection of updates – and the method of installation – is being controlled by corporate management.

If the AU settings are not grayed out, it suggests that the selection of updates - and the method of installation – is chosen by the user of the PC



### Understanding AssetMetrix's Update Policy Manager

As of April, 2005, the AssetAgent includes the *Update Policy Manager*, allowing administrators to enforce AU settings without necessarily requiring the deployment of a SUS server and software. These AU settings will supersede any user's previous selection and will also inhibit the user from further modifying the settings as well.

Now – using the Update Policy Manager functions – all corporate PC's Automatic Update settings (update time, frequency and various download and installation options) can be easily set and locked to ensure corporate policy for updating Microsoft products and components via AU.

## Configuring Update Policy Manager

Modifications to the AU settings are done during a regular AssetPulse inventory, and Update Policy Manager settings are configured as part of the AssetAgent configuration via the AssetPulse page.

Prior to deploying a new Pulse, you will need to first choose your AU parameters from the *AssetPulse Management* section located at the bottom of the AssetPulse page. Here you will find the Update Policy Manager (see below)

The screenshot displays the 'AssetPulse Management' web interface. The top navigation bar includes a home icon and the text 'AssetPulse Management View and modify your AssetPulse defaults.' Below this, the 'DemoCorp AssetPulse Defaults' section is visible. Under the 'Email Format' tab, four radio buttons are listed: 'HTML', 'HTML + Attachment' (which is selected), 'Plain Text + Attachment', and 'Plain Text + Hyperlink'. To the right, a preview of an 'AssetPulse Message' is shown, containing a sample email body and a legend for variables: '\$Account = Account name.', '\$Group = Group name.', '\$Date = AssetPulse date.', '\$Time = AssetPulse time.', and '\$Pulse = AssetPulse number.' The 'DemoCorp Windows Update Services Registry Settings' section follows, with the 'Update Policy Manager' tab selected. It features three radio buttons: 'ON - Set Automatic Update settings', 'Read Automatic Update Settings only (No changes will be written to the registry)' (which is selected), and 'OFF - Rollback to initial Automatic Update Settings'. Below these, the 'Automatic Update Configuration Options' section includes a 'Check for updates every' dropdown set to 'Day' at '1 am', an 'Options' dropdown set to 'Automatically download and scheduled installation', a text input field for 'Check for updates from this URL' with a note to leave it blank for Microsoft servers and a format example 'http://updateserverURL', and a 'Reboot PC: (After update installation)' dropdown set to 'No'.

## Update Policy Manager

### *ON / Set Automatic Update settings*

The AssetAgent will modify/create the appropriate AU registry keys (at HKEY\_LOCAL\_MACHINE\Software\Policies\Microsoft\Windows\WindowsUpdate) based on the AU Settings selected.

Any previous Windows Update keys will be backed up (within the Registry at HKEY\_LOCAL\_MACHINE\Software\Assetmetrix\WinSUS).

### *Read Automatic Update Settings only (no changes...)*

The AssetAgent will not make any changes to the Window Update registry keys. It will read the current settings only (if available).

### *OFF / Roll back initial Automatic Update settings*

The AssetAgent will 'rollback' the original Windows Update registry settings as contained in the Assetmetrix section of the Windows Registry.

## **AU Configuration Options**

### *Notify of download and installation*

When Windows finds updates that apply to this computer, an icon appears in the notification area, and a message appears that states that the updates are ready to be downloaded. If you click either the icon or the message, the option that you use to select the updates you want to download appears. Windows downloads the selected updates in the background. When the download is complete, the icon appears in the notification area again, and a message appears that states that the updates are ready to be installed. If you click either the icon or the message, the option that you use to select the updates you want to install appears.

### *Automatic download and notify of installation*

Windows finds updates that apply to your computer, and then downloads these updates in the background. The user is not notified or interrupted during this process. When the download is complete, the icon appears in the notification area, and a message that states that the updates are ready to be installed appears. If you click either the icon or the message, the option that you use to select the updates you want to install appears.

### *Automatic download and schedule the installation*

Windows finds updates that apply to your computer, and then downloads and installs these updates in the background. The user is not notified or interrupted during this process. If any one of the updates requires you to restart the computer to complete the installation, Windows restarts the computer automatically. (If a user is logged onto the computer when Windows is ready to restart it, the user is notified that Windows will restart. The user can choose to delay the restart operation.)

### *Reboot after Windows*

If you select 'Yes' and an update requires you to restart the computer, Windows restarts the computer automatically. Should a user be logged onto the computer when Windows is ready to restart it, the user is notified. The user can choose to delay the restart operation.

Selecting 'No' to reboot - Automatic Updates does not automatically restart a computer while users are logged on

### *Windows Update Server*

This setting configures Automatic Updates to optionally use your internal server that is running Software Update Services (SUS). To use Automatic Updates with a server that is running SUS, see the Software Update Services Deployment white paper at:

<http://www.microsoft.com/windowsserversystem/sus/susdeployment.mspx>



## AssetMETER - Software Metering

AssetMETER monitors software usage amongst your corporate Windows based PCs. AssetMETER can identify where applications are being infrequently used amongst your users, giving you the option to reallocate software licenses to others. AssetMETER can also identify abuses of corporate policy by identifying disproportionate usage of chat apps, games, and P2P file-swapping applications.

AssetMETER is only available as a value-add subscription to customers who subscribe to the yearly *Enterprise*-based services, and is not available separately. AssetMETER functions and reports will not appear in your service unless you subscribe to AssetMETER. Contact your AssetMetrix representative if you wish to add the AssetMETER subscription to your Enterprise-based subscription.

### How it works

AssetMETER is installed and activated during a typical 'AssetPulse' inventory,(or can be installed separate of an inventory). Once installed, AssetMETER runs silently and invisibly and 'logs' how long each application has been running.

AssetMETER logs the *accumulated* time that an application is used (both in 'focus' mode and in 'background' mode), rather than storing the exact times that the software was activated and de-activated.

AssetMETER continues to record software usage data into its log file until the *next* AssetPulse inventory is invoked. During that AssetPulse inventory, the AssetAgent (the hardware & software inventory component) will retrieve the AssetMETER log file, and then reset the log file.

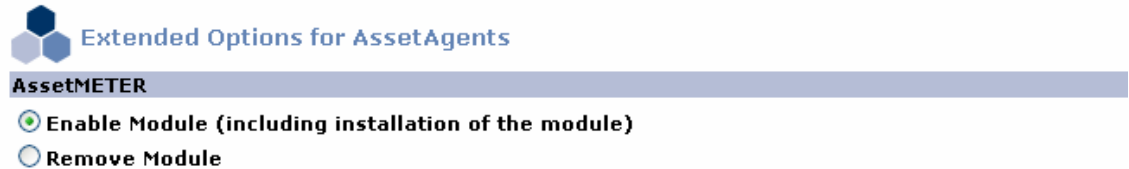
Since AssetMETER doesn't send data to your account, it will not interfere with any firewalls, anti-virus software, anti-spyware software or any other security based system.

The aggregate software usage data is then analyzed against the time range between the two AssetPulse inventories.

## Deploying and enabling AssetMETER

To deploy and enable AssetMETER, you will need to request an AssetPulse that is configured for *delivering* AssetMETER to your corporate PCS. .

1) From the *Extended Options for AssetAgents* section found on the AssetPulse Request Page, simply select 'Enable Module' underneath *AssetMETER*



2) Continue to choose the desired AssetAgent types (Email, Network/LAN, and Disk) as well as any required Delivery Method and/or Options (see the [Resources](#) section on our website for full details).

3) Click '*Send me the selected AssetAgents*'. Your new AssetPulse will arrive shortly.

## Deploying AssetMETER

Deploy the new AssetAgent(s) as you would normally (forward the AssetPulse email to all employees, setup the login script for the LAN AssetAgent, etc. - see the [Resources](#) section on our website for full details).

**NOTE:** It is recommended that you deploy the AssetMETER soon after you receive them via your AssetMetrix account. AssetMETER data analysis assumes that the 'start date' of AssetMETER is the same as the date you requested the AssetAgents. Any significant delay between receiving the AssetAgents and deploying the AssetAgents may create skewed calculations in both usage and cost forecasting.

## Collecting the data

Your AssetMETER reports will not be populated until the AssetMETER data is returned in the *next* AssetPulse inventory that you deploy. Simply use the recommended settings in the AssetMETER section when creating and deploying your next AssetPulse inventory, and your AssetMETER data will automatically populate your AssetMETER based reports.

**NOTE:** It is recommend you let AssetMETER run long enough to collect significant usage data, between one week to one month. You should then continue to use that time interval consistently when creating new pulses (i.e. an inventory once a week or once a month). In order to ensure that time-length (i.e. one week, one month, one quarter, etc.) used for Software usage analysis is consistant over the term of your AssetMetrix subscription.

## Terminating AssetMETER

Should you wish to terminate the AssetMETER modules that have been deployed to your PCs, you will need to request an AssetPulse that is configured for *removing* AssetMETER from your corporate PCS.

1) From the *Extended Options for AssetAgents* section found on the AssetPulse Request Page, simply select 'Enable Module' underneath *AssetMETER*



### AssetMETER

Enable Module (including installation of the module)

Remove Module

2)

2) Continue to choose the desired AssetAgent types (Email, Network/LAN, and Disk) as well as any required Delivery Method and/or Options (see the [Resources](#) section on our website for full details).

3) Click 'Send me the selected AssetAgents'. Your new AssetPulse will arrive shortly.

The AssetMETER module, log file, and associated registry key entries will be immediately deleted from that PC.

## Viewing the AssetMETER reports

Go to the "AssetMETER" section to view the following reports (with more to come....)

Metering software listed by Publisher.

AssetMETER Office – software usage data for applications found in Microsoft Office, Corel WordPerfect Office and Lotus Office 'suites'.

AssetMETER P2P – peer to peer (file sharing) application usage.

AssetMETER Games – gaming usage.

AssetMETER Chat Apps – Internet chat and instant messaging usage.



## Further Information

Revisions to this document – and other Technical and Reference notes - can be found at [www.AssetMetrix.com/resources](http://www.AssetMetrix.com/resources)

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