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Asset Control and Contract Management Solution 6.2 Release Notes

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Section 1 – Overview

1.1 Document Purpose

This document provides the “what’s new” and “known issues” information for the 6.2 release of Asset Control and Contract Management Solution.

1.2 Background

Include a brief background statement about the product release. Perhaps include the 50-word product description.

1.3 Documentation

Product documentation is available in the Asset Control and Contract Management Solution Product Guide (assetcontract.pdf and assetcontract.chm). To view Altiris product documentation in .PDF

format, use Adobe Acrobat Reader (available at: <http://www.adobe.com/products/acrobat/readstep2.html>).

Section 2 – Installation and Licensing

2.1 Installation

- Click Start > Programs > Altiris > Notification Server > Altiris Console to start the Altiris Console.
- Click the **Configuration** tab.
- In the left pane, click on **Upgrade/Install Additional Solutions**.
- Click the **Available Solutions** tab.
- Click the **Solutions** button.
- Select **Asset Control and Contract Management Solution**.
- Click **Start**.

2.2 Upgrading

Asset Control and Contract Management Solution 6.2 will only upgrade from version 6.1.

Section 3 – New Features in this Release

3.1 Scope Collections

3.1.1 Scope Software Products by Collections

A field named "**Scope Collection**" has been added to the Software License Search Rules section of the Software Installs page that appears when creating or editing a contract. **Scope Collection** lets you specify which computer collections to associate with the contract. This is later used to search for the number of contracts being used by a collection of computers. The information is reported in the **Summary** tab of a contract's **Resource Manager**, under **Software License Search Rules**.

Example: You have 10 Microsoft Word 2003 licenses and that are in use in two separate computer collections. You have entered both collections under Scope Collections. When you view the **Summary** page of the contract's **Resource Manager**, under **Software License Search Rule**, there will be an entry for each collection, telling you how many computers from each collection are using Microsoft Word 2003.

3.1.2 Scope Policy Collections

The **Assign Computer's Ownership to be the Primary User** configuration policy can be scoped by collection. This allows you to set up the policy for certain collections and exclude others.

3.2 Security Scoping for Reports

Two new fields are included on the new **Report Scoping** configuration page (**Configuration > Solutions Settings > Assets and Inventory > Report Scoping**) under the heading **Security Enabled Report Filtering**. The fields let you restrict report results to the assets that the users running the reports have security access to.

3.2.1 Enable associated security reporting

Filters security enabled report results based upon resource associations between the logged on user and organizational types.

3.2.2 Enable "Report on owned resources" permission security for reporting

Filters security enabled report results based upon the "Report on owned resources" permission. This permission is applied against Locations, Cost Centers and Departments.

3.2.3 Reports with the new Security features

- Assets by Owner's Department
- All Office Equipment
- All Furniture and Fixtures
- All Scanners
- All Cell Phones
- All Desk Phones
- All Monitors
- All Computers
- All Unmanaged Computers
- All Assets
- Assets marked for Depreciation without Accounting Information entries
- Assets marked for Depreciation without Depreciation Schedule(s)
- Assets marked for Depreciation without Starting Value
- Assets that have attached devices with different owners
- Assets that Primary User differs from Asset Owner
- Assets with Changed Owner
- Assets with Changed Cost Center
- Assets with Changed Status
- Assets with Changed Location
- Assets Disposed from 'N' to 'N'
- Assets Disposed in the last N Days
- Assets Created in Last N Days
- Assets Modified in Last N Days
- Assets Missing System Number
- Assets Missing Bar Code

- Assets whose location differs from their Owners' location
- Assets by Type, Status and Location
- Assets by Type, Status, Department and Location
- Assets by Type, Status, Location and Cost Center

3.3 Software Purchases are Automatically Associated with Software Contracts

A Software Purchase Search Rule has been added under the Software Purchases tab of Software Licenses. The feature lets you create rules to associate Software Purchase contracts with Software Licenses. Example: you create a Win32 license for Microsoft Office 2003 and you create a Software Purchase Search Rule %Office 2003%. The rule will search for any Software Purchase contracts with "Office 2003" in the name, and automatically create associations with the Microsoft Office 2003 license.

3.4 Organizational types determine which Resources appear in Reports and Console

Changes to security mean that you can only see resources that you have permissions to, according to resource types. Example: you are the Department Manager and are assigned to a Department resource. You can see all the assets in your department and edit the data classes that you have access to. When you run a report, only information relating to the assets you have access to will appear in the results. This functionality also applies to information displayed on Asset Summary pages.

3.5 User Change History captures any change made to a Resource

Any time a user changes or updates a resource (asset or contract), the user history records the user's name, the machine they made the modification from, date, and time.

3.6 New Field to allow automatic movement of Child Assets

A new field "Also move associated assets" appears in the dialog that appears when you right-click on an asset to assign it to a location. The field allows you to choose whether child assets move automatically when you move the parent asset.

3.7 New Reports

3.7.1 All Products Discovered by Multiple Rules

This report is located in the **Reports > Assets and Inventory > Contract Management** folder and returns results on any software product discovered by multiple rules.

3.7.2 Assets with Expired Warranties

This report lists assets (by warranty contract) expiring within a user specified number of days.

3.7.3 Software License Compliance Trend

This report displays a graph reporting on software compliance over a period of time. Filter by license and date.

3.7.4 Computers with Inventoried and Non-Inventoried Installs

This report returns a table of all computers associated with inventoried and non-inventoried software licenses.

3.7.5 Resources Merged in the last 7 days

3.7.6 Changes made in the last 7 days

Lists all changes made in the last 7 days and can be filtered by User and Computer.

3.7.7 Software Licenses by Computer

This report shows all the Software License contracts that are assigned to a computer. The report is most useful to look at an individual computer. Double-click any of the results to see the Software license contract. The information is current as of the last Software License Evaluation run.

3.7.8 Software Licenses by Owner/User

This report shows all the Software License contracts that are assigned to the computers that an owner (User) has been assigned. The report is useful for looking at an individual user to find licenses that are on any of the computers the user has ownership of. Double-click any of the results to see the Software license contract. The information is current as of the last Software License Evaluation run. For more information on how to use Software Licenses contracts or run the Software License Evaluation, please consult the documentation.

3.8 Total Cost of Ownership Solution Reports are now included in Asset Control and Contract Management Solution

All reports previously included in Altiris Total Cost of Ownership Solution have been merged into Asset Control and Contract Management Solution.

3.9 New "Data Source" Column in the Discovered Software Applications Dialog

Open a Software License > click the **Software Installs** Tab > Click the **Add List** button next to **Software License Search Rules** > click **Search**, and a table appears. A new column, "**Data Source**" has been added to the table. **Data Source** tells you which inventory-populated table the discovered software application comes from. Examples: Audit_Software, Add-Remove, Discovered Applications.

3.10 Bulk Edit

Users can now select multiple resources, right-click and edit them simultaneously. Only the common data classes and associations from the selected resources are shown for editing and will be affected by changes made.

3.11 User Resource Type now has a direct Association with Location Resource Type

3.12 User Resource Type now has a direct Association with Department Resource Type

3.13 Dataclasses and Report Columns can be displayed with customized names

You can change the names of dataclasses and report columns to names that may be more relevant to your situation. Example: change Zip Code to "Post Code".

3.14 Configurable Summary Screen

Administrators can configure security settings to control what users can and cannot see in asset and contract summary pages.

3.15 Strings Display As Settings Rule

A new configuration rule has been added that lets you change the display name of a resource type throughout the solution. Example: change "Cost Center" to "Business Unit".

3.16 Reverse Resource Associations

You can now reverse the parent and child associations between resources, with reverse resource associations.

3.17 New Notification Policies

The following notification policies have been added to the **Tasks > Contract Management > Licensing** folder:

3.17.1 Contracts Expiring in the next 30 days

3.17.2 Contracts Expiring in the next 60 days

3.17.3 Contracts expiring in the next 90 days

3.17.4 Software License out of Compliance

3.17.5 Software License within 10% of Purchased Licenses

This policy sends notification when you have used 90% or more of a type of Software License. Example: you have 100 Windows XP Licenses. When you activate the ninetieth license, the policy will notify you that you only have 10% of the Windows XP licenses left.

3.18 Software License Evaluation Policy

This policy evaluates software licenses on a schedule in order to maintain accurate data in a Software License's Summary page and Software License reports. Functionality includes forcing an evaluation of the data from the Summary page and an automatic evaluation of data after a specified time period.

Section 4 – Feature Enhancements in this Release

4.1 Software Products now called “Software License Search Rules”

In the Summary page of a contract’s resource manager or when editing or creating a contract, the Software Products field is now titled “Software License Search Rules”.

4.2 Resource Selector Remembers Your Last Selection

When you select an owner for a resource using the Resource Selector window, it remembers your selection from the last time you used it. Example: you have a computer that you assign to a User located in “Test Department”. Next, you want to assign a monitor to the same user. When you click the Owners edit icon, the Resource Selector will automatically open to Test Department.

4.3 Resource Selector has two Panes

In addition to the treeview/left pane, the Resource Selector window now has a pane with a table of available resources. The second pane is empty, and contains a Search field. As you type the name of the resource you are searching for, the Resource Selector automatically searches for the text you are typing and displays a list of resources in the table below.

4.4 User Summary Page Contains Links to Associated Resources

A User resource’s summary page tells you which Department, Cost Center, Location, and any Assets the User is associated with. Each of the resources has a link you can click on to open the resource manager for the resource.

4.5 Changes to the Resource Association Diagram (RAD)

The RAD now includes two new filters. The **Association Type Filter** lets you choose which type of association types you want to see displayed in the RAD, and the **Resource Type Filter** lets you choose which resource types you want to see.

4.6 Synchronize Hierarchy Collections includes a Schedule

This policy now has a schedule to automatically update collections.

4.7 Changes to Merging Resources

4.7.1 Create a Merge Policy for any type of Asset

Previously, you could only merge large numbers of computer and user resources with the **Duplicate Computer Merge** and **Duplicate User Merge** rules. Now you can create rules to merge a large number of resources for any asset resource type by right-clicking the **Merge Rules** folder (under **Configuration > Solutions Settings > Assets and Inventory > Asset Control**) and selecting **New > Resource Merge Rule**. You cannot create a merge rule for multi-row data classes.

4.7.2 Specify if old or new data takes precedence

Previously, when merging a number of duplicate computers or users, the merged resources would retain information from the data classes with the newest data. Now you can specify which data classes (older or newer) take precedence and override the other.

- 4.7.3 **Deprecated Asset's GUID included in Asset History**
After you merge two computers, the GUID of the deprecated asset will be recorded in the history of the surviving asset.
- 4.7.4 **New Merge Keys**
All resource fields can be added as merge keys. The merge keys **Asset Tag**, **Serial Number**, **Barcode**, and **Name** are always available.
- 4.7.5 **Assets created from Inventory become primary assets**
When merging a manually created asset with an asset created from an inventory, the asset created through inventory will become the primary asset.
- 4.8 **Changes to Resource Summary pages**
When viewing a resource's summary page, you can click on the linked name of any associated resource to access it.
- 4.9 **Asset Tag Field name changed to "System Number"**
The field appears in the **Asset Identity** data class.
- 4.10 **Asset Tag Data Class name changed to "Asset Identity"**
- 4.11 **Asset Identity Data Class added to Users, Locations, and Departments**
- 4.12 **Changes to Security Roles**
The security roles **Asset Data Entry**, **Receiving Administrator**, **Receiving Manager**, and **Receiving Worker** are no longer included in a new install of the solution. If you were using these roles and upgrade from a previous version, the roles will remain.
- 4.13 **Changes to Inventory to Asset Data Synchronization**
This policy can now be scoped by collections. This lets you include or exclude computer collections in the synchronization process.
- 4.14 **Fields added to Non Inventoried Installs Data Class**
The fields "Type" for Software License status, and "Assigned" for the User assigned to the license, have been added to the data class.
- 4.15 **Software License Options section on the Contract Global Configuration page**
A **Software License Options** section has been added to the **Contract Global Configuration** policy page. This section lets you specify a period of time before App Metering or Inventory information is considered to be outdated.
- 4.16 **Software License timeout has been reduced from 15 minutes to 5 minutes**
If a user is idle for over 5 minutes, the license in use times out and is then available for another user.

Section 5 – Known Issues

5.1 Asset Control and Contract Management Solution is unusable after upgrade

If you upgrade from Notification Server SP2 Hot Fix 19 and Asset Control and Contract Management Solution 6.1 to Notification Server SP3 and Asset Control and Contract Management Solution 6.2, you may not be able to view any of the Asset Control or Contract Management pages in the Altiris Console. To work around this issue, restart the Altiris Service.

5.2 Asset Incident History errors after Upgrading

When upgrading from Asset Control and Contract Management Solution 6.1 to 6.2 on Notification Server 6.0 SP3, an asset incident history page may produce an error. To work around this problem, close the history page, edit the asset, save the changes, then open the history page again.

5.3 Licenses with [] brackets in the product name return false errors

When installing a license, any product name with "[]" brackets around the name will break the SQL query and return a false error. The problem can be avoided by adding extra "[]" brackets next to the product name. Example: "Microsoft Visio [English]" would need to be changed to "Microsoft Visio [[]English]".

5.4 This Beta release does not support SQL 2005

The final release of Asset Control and Contract Management Solution 6.2 will support SQL 2005.

5.5 The "View Doc" option does not open documents attached to a contract

The **View Doc** option in the **Associated Documents** tab of a contract does not open the selected document in the table. This occurs because the contract was saved to a local path when adding a document to a contract. Ensure that documents are saved to a UNC path. Example: [\\network\c\\$\test.txt](\\network\c$\test.txt).

5.6 User Summary tab does not immediately display all Incidents assigned to a User

All incidents assigned to a User may take some time to appear in the Summary tab.

5.7 Software License Search Rules does not allow User to add the same Collection for consecutive Rules

In the **Scope Collection** field of the **Software License Search Rules** section (under the **Software Installs** tab of a Software License), if you select a collection that is being used by another rule, the **Scope Collection** field for the new rule will appear blank. To work around the problem:

- Click the Scope Collection field for the new rule.
- Select the collection you want to use.
- Click **Apply** (the field will appear blank).
- Click the Scope Collection field again.
- Select another collection.
- Click **Apply**.
- Click the Scope Collection field a third time.
- Select the collection you want to use.

- Click **Apply** (the field will be populated by the collection you want to use).

5.8 Incorrect items are displayed in Security Role Manager

This problem can occur when adding or removing a security role's access to items under the Asset Types, Financial Types, Organizational Types, Other Resources, or Contract Types folders in the Security Role Manager. The problem can manifest itself in two ways:

- After adding a folder (including all the items in the folder) to a security role, the folder's items are not displayed in Security Role Manager. Example: after giving Altiris Guests access to all items in the folder Asset Types, only the Asset Types folder will appear in the left pane of the Security Role Manager. None of the items in the folder will appear. If you want to view all items, they must be selected individually.
- After removing items from a security role, the items can still appear in the left pane of Security Role Manager. Example: after clearing all items in the Asset Types folder for the Asset Manager security role, some of the items may still appear in Security Role Manager.

5.9 Asset Control and Contract Management Solution unusable after upgrade

If you upgrade from Notification Server SP2 (Hot Fix 19) with Asset Control Solution 6.1.1122 and Contract Management Solution 6.2.1125, to Notification Server SP3 and Asset Control and Contract Management Solution 6.2, every page will generate an error. To work around this problem, restart the Altiris Service.

5.10 Barcode Solution Issue

Quickscan functionality on a handheld device fails to match barcodes to resources after installing Asset Control and Contract Management Solution 6.2. This problem is scheduled to be fixed in Barcode Solution 6.6 SP1 due to be released immediately after Asset and Contract 6.2.

5.11 Internet browser language must have a sub-culture

If your internet browser language is set to a language without a sub-culture, an application error occurs when attempting to create a new resource in Asset Control and Contract Management Solution. To avoid the error, ensure your browser language has a sub-culture.

5.12 Duplicate Picker names in Resource Association Configuration page

When creating an editable resource association type (**Configuration > Resource Settings > Resource Associations > Asset Association Types**), the **Enable Editing From** field presents two of each option. Also, see item 5.13.

5.13 Item Pickers for User Defined Resource Association Types display no resources

When creating or editing an editable resource association type, the **Enable Editing From** field lets you choose from a number of editors in a drop-down list. When you are editing a resource, the editor you have chosen may not display any information. This is because the editor you have chosen is not designed to display the resources that items that you need to edit. Example: You are editing a resource and want to associate a company to the resource through your user defined association type. You click on the item picker and the **Resource Selector** dialog shows up blank. To work around this problem, go back into the **Edit Resource Association Type** screen and choose another editor from the **Enable Editing From** field. Note that there are some editors in the list that have identical names even though they function differently. Also see item 5.12.

5.14 Context sensitive help displays wrong information for Report Scoping page

When you open the context sensitive help on the **Report Scoping** page, it will display the documentation for the **Asset Global Settings** page.