

Deployment Guide

IT ASSET MANAGEMENT PACK

for Microsoft® System Center Service Manager



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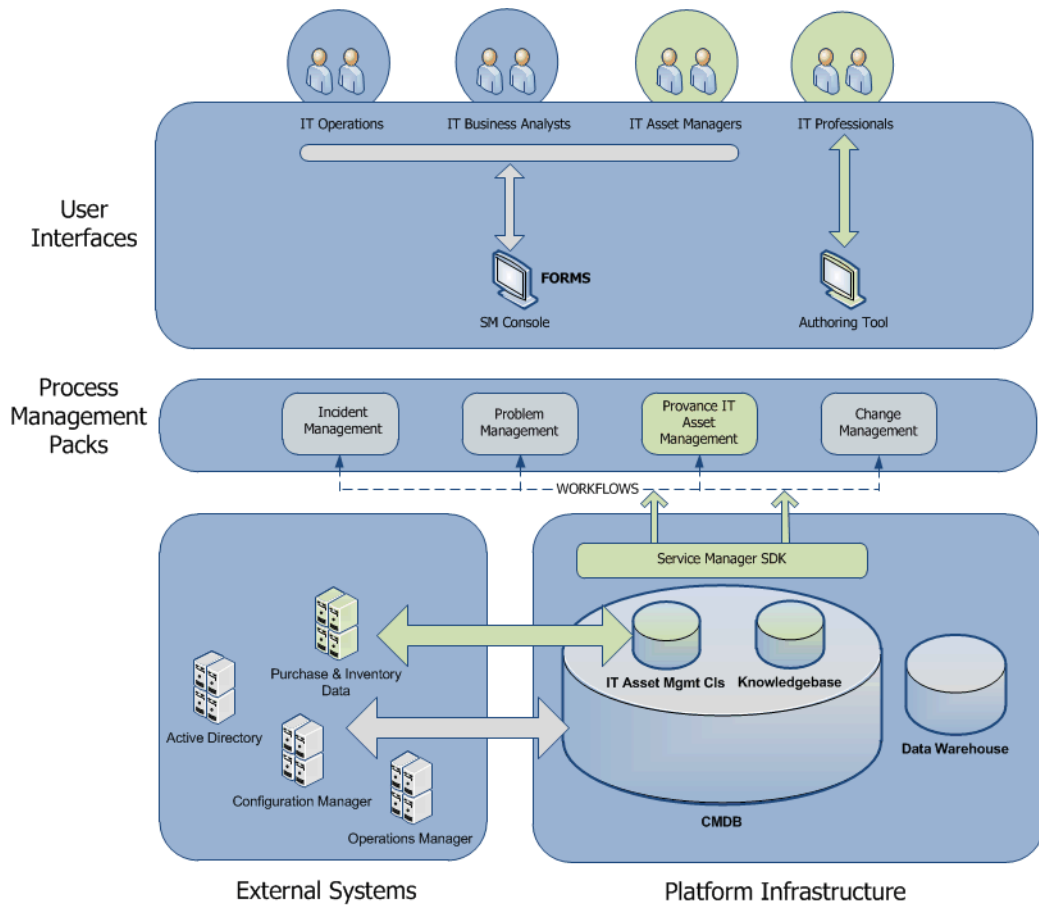
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1 Preparing for an IT Asset Management Pack Deployment

Overview

The Provance™ IT Asset Management Pack is a Process Management Pack that runs within Microsoft® System Center Service Manager 2010. It supplements the Incident, Problem and Change Management capabilities of Service Manager with powerful IT Asset Life Cycle Management and Software Asset Management. Supporting ITIL® and the Microsoft Operations Framework, Provance strengthens the IT effectiveness of companies at every level of the Microsoft Core Infrastructure Optimization model. With the Provance IT Asset Management Pack for Microsoft System Center Service Manager, you can drive down IT costs, increase service management efficiency and reduce security and compliance risks.



Provance IT Asset Management Pack Integrated into the SCSSM Platform

Platform infrastructure

As an SCSM Process Management Pack, the IT Asset Management Pack leverages the Configuration Management Database (CMDB) by adding Configuration Items (CIs) to store additional asset related organizational, financial, and contractual information.

Knowledge items can be created to provide additional information on internal processes, notes regarding specific assets and documentation which can be shared across all SCSM components. Knowledge items are linked to specific CIs and asset items to provide additional context.

The data warehouse is used by the IT Asset Management Pack for high performance reporting based on current and historical data. Dashboard and reports are provided out-of-the-box with the IT Asset Management Pack. Custom reports can also be created based on IT asset management data in the data warehouse.

External systems

The IT Asset Management Pack leverages the out-of-the-box connectors to CSV data, Active Directory and Configuration Manager provided by the SCSM platform. IT Asset Management software and hardware asset information, contractual and financial data can be imported from an external system via the SCSM CSV connector or via the Provanance Data Management management pack. Active Directory provides user and organizational information. Configuration Manager provides software and hardware configuration data that is leveraged by the IT Asset Management Pack.

System requirements

The IT Asset Management Pack requires Microsoft® System Center Service Manager 2010, Service Pack 1. SCSM must be installed, configured and up and running prior to installing the IT Asset Management Pack. For more information on the system requirements for SCSM, please see the SCSM documentation.

Capacity planning

For capacity planning purposes, use the SCSM Sizing Helper that is shipped with SCSM 2010. Using this tool you can enter information about your deployment and gain insight into the recommended hardware, configuration, and component distribution for planning purposes. The IT Asset Management Pack should install and run efficiently within the topology recommended by the SCSM Sizing Helper.

2 Installing and Launching the IT Asset Management Pack

The IT Asset Management Pack may be installed, upgraded, and changed (i.e., features added or removed). If you have never installed the IT Asset Management Pack before on a given server, or you have had to uninstall it, then you will be performing a new install. If you already have the previous release of the IT Asset Management Pack, then you will be performing an upgrade. If you are adding a feature to an existing installation, such as the Data Management Pack, then you will be performing a change.

Installing the IT Asset Management Pack

Installation checklist

The following checklist summarizes the items required before and after the actual installation of the IT Asset Management Pack:

1. Install and configure Microsoft® System Center Service Manager 2010, Service Pack 1.
2. (Optional) Install the System Center Service Manager 2010 Authoring Tool, if you are going to extend or modify the IT Asset Management Pack with it.
3. Install a data warehouse, which is required for reporting on IT Asset Management activities. You may optionally install a data warehouse after the management pack is installed. If you perform the latter, you must register the data warehouse within SCSM. In the Administration workspace, click the **Register with Service Manager Data Warehouse** link.
4. Back up the entire SCSM database.
5. Ensure that the SCSM Console is closed.
6. Perform the install using an Administrator account with associated administrator privileges on the system that is running the SCSM management server.
7. Install the IT Asset Management Pack on a management server (main or secondary). Do not install it on a data warehouse server.
8. Install to a management server if you also plan to use the Service Manager Console as a stand-alone tool. All the information that a Service Manager Console requires to use the IT Asset Management Pack, is obtained automatically from the management server when they are connected.
9. Ensure both of the following services are running before the installation begins: System Center Data Access Service and SQL Server Service.

- 10.(Optional) Install the IT Asset Management Pack components for use with the Authoring Tool.

Installation steps

To install the Provance IT Asset Management Pack:

1. Save the Setup folder to an SCSM management server and run the file **Setup.exe** to begin the installation process. The installation wizard launches and guides you through each step of the installation.
2. The first step in the installation wizard includes the following installation options:

OPTION	DESCRIPTION
Install Provance Management Packs for System Center Service Manager	Choose this option to install the management pack to a management server.
Install the IT Asset Management Pack components for the Authoring Tool	Choose this option to install the classes and forms required to extend or modify the management pack with the Authoring Tool.
View the IT Asset Management Deployment Guide	Choose this option to open this Deployment Guide.

NOTES: *After you select an option, the installer checks that a management server or Authoring Tool is installed on the system, depending on the option chosen. When the installer cannot find a management server or Authoring Tool, it generates an error message and returns to the opening screen of the wizard.*

The installer also checks to see if an existing SCSM Console is open. All SCSM Consoles must be closed before the installation can continue.

If you choose the first option, the Select products to install page opens.

3. Select and expand **Provance Management Packs for System Center Service Manager**. Ensure that IT Asset Management Pack is also selected.
4. Enter the **Activation key** provided for the IT Asset Management Pack.
5. Click **Next**. The Review and Accept End User License Agreement page opens.
6. Select your country. Please read the end user license agreement in its entirety. You may print and review the license agreement prior to accept-

ing it. If you choose not to accept the license agreement, the installation will not continue.

7. To accept the license agreement, click the check box beside **I have read, understood and agree with the terms of the license agreement.**
8. To cancel the installation, click **Cancel.**
9. Once you accept the license agreement, click **Install** to continue the installation.
A progress bar shows the status and progress of the installation.
10. Once the management packs are installed, a summary screen appears confirming that they have successfully installed, along with links to product documentation, the support community at <http://community.provance.com>, and to additional product information.
11. To exit the installation, click **Close.**
12. Install the online help onto your SCSM Consoles, see "Install online help" on page 2-4.
13. Configure the IT Asset Management Pack, see "Configure the IT Asset Management Pack" on page 2-5.

Install online help

Users who have installed the SCSM Console locally to their PC may not have access to the online help for the IT Asset Management Pack. For desktop users of the SCSM Console to access the online help, the Provance.chm file needs to be copied locally onto their systems.

To install online help for use with a local SCSM Console:

1. Find the Provance.chm file, which should be in the following directory on the server:
`X:\Program Files\Microsoft System Center\Service Manager 2010`
2. Copy Provance.chm to the following local directory:
`X:\Program Files\Microsoft System Center\Service Manager 2010`
3. Restart the SCSM Console.

Configure the IT Asset Management Pack

Table 2-1 describes the settings and entities you should consider configuring after you install the IT Asset Management Pack. Refer to the User Guide for detailed instructions related to their configuration.

TABLE 2-1. Configuration Settings

Setting	Description	Recommended
Locations	Add locations based on your company's organization, such as cities, buildings, cubicles, and racks.	Yes
Organizations	Add organizations based on your company's structure, such as business units, regions, and departments.	Yes
Cost Centers	Add cost centers based on your company's financial organization.	Yes
Hardware contracts	Add contracts associated with hardware assets.	Yes
Hardware assets	Add hardware assets. These are the items you will manage.	Yes
Software assets	Add software assets to manage SKUs, software titles and licenses.	Yes
Base currency	A base currency is used as the currency displayed in all reports. The default is U.S. dollars.	Yes, if you plan to have more than one currency in use.
Exchange rates	Add an exchange rate for each additional currency so it can be converted to the base currency in reports.	Yes, if you plan to have more than one currency in use.

TABLE 2-1. Configuration Settings (Continued)

Setting	Description	Recommended
Enable duplicate asset tags and serial numbers		No
Product usage rights	The lists for language and region need to be configured before you can enter product usage rights.	Optional
Software usage data	Configure a connector to collect software usage data and then map the data to one or more software versions.	Optional
Hardware workflow	Create a relationship between a hardware asset and its incidents. Incidents are visible from the Related Items tab of the asset.	Optional
User defined agreements	Add your own agreements to the existing agreement types.	Optional
Management pack specific settings	If you purchased an additional management pack, refer to its instructions for configuration settings.	

Uninstalling management packs

As a product suite, Provance Management Packs can be uninstalled by using the Add/Remove programs feature in Windows XP and Vista, or the Programs, Uninstall a Program, feature in Windows 7. Individual management packs, such as the IT Asset Management Pack, can be removed by running Setup.exe.

WARNING: Uninstalling the management pack also removes the IT Asset Management Pack data. It is not necessary to uninstall the IT Asset Management Pack before upgrading it.

If you have created any new views or performed modifications, you will be required to remove any dependencies prior to uninstalling the software.

With the Software Usage feature, if you have created a connector to Configuration Manager, you should delete the connector before uninstalling Software Usage. The connector is not removed during an uninstall.

To uninstall a management pack:

1. Close any open SCSM Console.
2. Run the Provance **Setup.exe** file.
3. Click **Change, Repair or Remove Features of Provance Management Packs for Service Manager**. The Select products to install page opens.
4. Deselect each management pack (feature) that you wish to uninstall, such as IT Asset Management Pack. Do not deselect **Provance Management Packs for MS SCSM** because it cannot be removed using the installer. Only individual management packs can be removed.
5. Click **Next**. The installer removes the deselected management packs.

Authoring tool notes

If you have modified any of the Provance management pack files with the Authoring Tool, uninstalling the IT Asset Management Pack Authoring Tool components does not remove any files from your computer that you have changed with the Authoring Tool.

If you need to uninstall the Authoring Tool itself, first uninstall the Authoring Tool components. This will prevent you from receiving an error when uninstalling the Authoring Tool components. The msi error message you can receive is "A network error occurred while attempting to read from the file: C:\Windows\Installer\Provance.ITAM.AuthoringComponents.msi".

If you receive the msi error message while uninstalling the components, because you have removed the Authoring Tool first, manually remove the components as follows:

1. Go to the folder where the Provance.ITAM.AuthoringComponents.msi file is located.

2. At the Start menu, type run and enter `msiexec /x Provance.ITAM.AuthoringComponents.msi /q`.

Upgrading the IT Asset Management Pack

Upgrading the management pack affects your migrated data as follows:

- When upgrading from a previous release, all software licenses will become base licenses (as indicated on their SKUs). If the license needs to be an upgrade, change it manually on the SKU. In either case, you should review your SKUs/software licenses to ensure that they now have the upgrade or downgrade version rights indicated on them.
- CIs will be automatically linked to hardware assets
- Some software items will be automatically excluded from counts based on the life cycle status of their hardware asset

These changes result from new or improved features. For more details regarding these features, refer to the User Guide.

To upgrade the IT Asset Management Pack:

Prerequisites: The upgrade path is from any of the following versions of the IT Asset Management Pack: 1.1, 1.1 Cumulative Update 1 and 1.1 International (with the loss of localization). This release does not support an upgrade from 1.0. The upgrade path from 1.0 is to 1.1 Cumulative Update 1 or 1.1 International. Find your version under Administration workspace > Management Packs and search for "Provance" management packs. Close the SCSM Console before beginning the upgrade.

1. Close any open SCSM Console.
2. Run the Provance **Setup.exe** file.
3. Click **Upgrade Provance Management Packs for System Center Service Manager**. The Select products to install page opens.
4. Select all the management pack that you wish to upgrade, such as the IT Asset Management Pack, and click **Next**. You should upgrade every man-

agement at the same time, even if there is no change to it. A progress bar shows the status and progress of the upgrade.

NOTE: *Deselecting any management pack (feature) on this page uninstalls it.*

5. Once the management packs are upgraded, a summary screen appears confirming that the installation was successful, along with links to product documentation, the support community at <http://community.provance.com>, and to additional product information.
6. To exit the installation, click **Close**.

Launching the IT Asset Management Pack

When the installation completes successfully you are now ready to begin using the IT Asset Management Pack. Go to the Start menu and launch the SCSM Console.

The navigation pane on the left hand side of the SCSM Console contains a series of workspaces representing the various components installed with SCSM. The Provance IT Asset Management workspace can be identified by the Provance logo and IT Asset Management Pack.

Authoring Tool components

The IT Asset Management Pack components for the Authoring Tool are used to extend or modify the management pack with the Authoring Tool. Both classes and forms are included with the components. During installation, the IT Asset Management Pack imports all four management packs required for customization, into the Authoring Tool. Please note that changing the classes and forms may affect the ability to upgrade the management pack to a newer version. All changes must be tested independently with each IT Asset Man-

agement Pack version. Customized forms and workflows may also impact problem determination and resolution. Any changes or customizations you perform will only run on version 1.2 or higher of the IT Asset Management Pack.

When customizing management packs, store them outside the Service Manager 2010 Authoring folder. This preserves them if you later uninstall the Authoring Tool.

In terms of reporting, any derived classes and properties will not be sent to the data warehouse per Microsoft documentation. Extended classes may be sent to the data warehouse (see SCSM documentation for potential exceptions). It should be noted that standard IT Asset Management Pack reporting will not show any custom fields.

Because the IT Asset Management Pack behaves like any Microsoft management pack under the Authoring Tool, no special processing needs to be performed. Modifying forms, classes and potentially adding additional workflows, may also modify the default behavior of the IT Asset Management Pack and its usage documented in the IT Asset Management Pack User Guide and online help.

Adding a field example

The Authoring Tool use and best practices are documented in Microsoft's online help, User Guide and blogs. As an example, to add a new field to either a Microsoft form or an IT Asset Management Pack form, use the following general process:

1. Find the appropriate class and extend it by saving it to a custom management pack.
2. Add a field to the form and link to the extended class property via the binding.
3. Save the form extensions in a custom management pack.

NOTE: *Dependencies are created whenever you extend a class, between the new management pack where the class is saved and the new management pack with the form.*

4. Seal and bundle the management pack. If you want your customizations to be sent to the data warehouse, the management pack must be sealed. Unsealed management packs do not synchronize with the data warehouse.
5. Import the management pack into SCSM before using it.

As noted, this is the same process for both Microsoft management packs and IT Asset Management Packs.

License administration

The IT Asset Management Pack can run in two modes: Evaluation and Commercial License. If you have not yet purchased a commercial license or entered a commercial license key to enable your commercial license, the IT Asset Management Pack will run in evaluation mode. An evaluation license enables you to leverage a fully functioning copy of the software for a 90 day period. After the 90 day evaluation period, you can no longer access IT Asset Management Pack functionality until you purchase a commercial license. For more information on managing Provance IT Asset Management Pack licenses, please see the Licensing section of the IT Asset Management Pack User Guide. For information about purchasing a commercial license, please go to www.provance.com.

3 Importing Data from Third Party Systems

You may have asset data in one or more external systems in your organization and wish to import that data for use with the Provance IT Asset Management Pack. Information can be easily imported using CSV data files and XML based format files. SCSM provides the ability to import data into the database through the **Import from CSV** file feature. Provance also provides the ability to import data from a csv file or a SQL Server database using the Data Management Pack. For more information on importing configuration item files using the SCSM **Import from CSV** utility, refer to the SCSM documentation.

NOTE: *Large data files may take more time to import.*

Sample data

Provance provides sample data to be used with the IT Asset Management Pack. You can use the sample data as is, or leverage the format of the sample files to create your own data.

Sample data can be downloaded from the Resources section of the Provance support community at <http://community.provance.com>.

User roles

There are various types of users who will use the features and functionality within the IT Asset Management Pack, ranging from reading, editing, importing and managing asset related information, as well as customizing the solution:

- **IT Asset Managers**, or those with asset management responsibility, and users who have access to the SCSM Console, will be able to leverage the functionality of the IT Asset Management Pack for software and hardware life cycle management and contract management.
- **Incident Resolvers** can access the IT Asset Management Pack data to obtain additional information on hardware and software assets to support change requests and incidents.
- **End users** will use forms in the IT Asset Management Pack to enter, edit, manage and view data within the SCSM Console.
- **IT personnel**, or solution providers for the IT Asset Management solution, may use the SCSM Authoring Console to customize the IT Asset Management Pack to suit the needs of their organization.

4 Troubleshooting Tips

Installation log

If you encounter issues during the installation, view the installation log from the Install wizard or by opening the log in a text editor. The installation log file, `ProvanceITAMSetupXX.log`, can be found in the TEMP directory, as defined in your system variable. System administrators can easily locate the log file by typing `CD %TEMP%` at a command prompt, or by typing `SET` at a command prompt to view the TEMP variable directory setting.

Review the installation log for additional details that may have occurred during the installation process.

Missing data in reports

Some reports may appear to be missing data. This may occur if the SCSSM data warehouse has been synchronized prior to the installation of the IT Asset Management Pack. As data is updated, it will be updated in the data warehouse and appear in IT Asset Management reports.

Adding custom picklist or drop-down values

The IT Asset Management Pack has business and validation rules as well as workflows that depend on out-of-the-box values in drop-down picklists. These rules and workflows do not leverage any additional picklist values that may be added when customizing the solution.