

S I T E K E E P E R U S E R ' S G U I D E

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About Sitekeeper

Sitekeeper consists of two modules: **License and Inventory Tracker** and **PushInstaller**. **License and Inventory Tracker** enables you to easily and automatically keep your software programs and licensing completely current. **License and Inventory Tracker** automatically logs and monitors installed programs on networked machines across your entire site. Additionally, *Sitekeeper* gives you the ability to inventory hardware devices installed on machines on your network.

The **PushInstall** module enables you to install new programs or updates over your network. You can also uninstall programs on remote machines.

- **License and Inventory Tracker:** This module tracks program licenses so you can stay legally compliant. License Tracker makes up-to-date license record keeping easy. Inventory Tracker automatically tracks and keeps updated records on the types of software, and versions of that software, as well as the hardware devices installed on your managed machines.
- **PushInstaller:** PushInstaller enables administrators to easily install or uninstall programs, updates, upgrades and patches which are logo-compliant for *Windows* 2000 and XP, or *Microsoft-Installer*-compliant, on managed machines.

Note: A *Microsoft Windows* installer (.msi) file is a storage file containing instructions and data required to install an application. Most software developed for *Windows* NT, 2000 and XP systems includes this file.

Sitekeeper modules can be licensed separately or together. The modules are licensed per machines managed by *Sitekeeper*.

All *Sitekeeper* functions offer wizards to help you quickly and easily specify settings and carry out processes.

Inventory and License Tracker

The **Inventory and License Tracker** module maintains data on all the programs and hardware devices installed on your managed machines. When the Inventory and License Tracker is set up, a Windows Service is launched. It compiles information when *Sitekeeper* scans managed machines. The data is then stored in *Sitekeeper's* database. Additionally, after you scan the machines you specified that *Sitekeeper* should manage, you can use **Inventory and License Tracker** to analyze your license compliance.

The data is obtained from each managed machine's *Windows* Registry - the same information used by the Add/Remove Programs feature in the *Windows* Control Panel. The data includes all information provided by each software publisher, such as software name, version (major and minor), build number or patch level, and name of publisher. The number of copies of each type of program installed is also totaled.

Note: If you want to maintain inventory data for machines running Windows 9.x, Millennium Edition, or XP Home Edition, you must install the *Sitekeeper* agent on those machines. Additionally, you must install the agent on machines for which you want to gather information about legacy programs. Legacy programs are DOS programs and older Windows programs that either place no information at all in the registry, or do not follow standard Windows conventions in where they place information in the registry.

Inventory and License Tracker uses little system resources. On an average network, Inventory and License Tracker scans and reports on five to ten computers a second. It compiles information every time you scan selected managed machines, or during a scheduled scan of all your managed machines.

Once *Sitekeeper* has gathered the data, you can generate a Software Inventory Report by Product or by Machine. You can also generate Hardware Inventory Reports by Device or Machine.

Note: Inventory data is reported strictly to the server or workstation from which you are running *Sitekeeper*. The information is **not transmitted outside** of your organization.

After you scan the machines you specified that *Sitekeeper* should manage, you can use **Inventory and License Tracker** to analyze your license compliance.

First, use the Add or Remove Program Licenses Wizard to enter licensing information. When running this wizard, you enter the number of licenses owned by your organization for each program inventoried. Because different numbers of licenses may have been purchased at different times, the wizard presents each product type and version so a complete total of each product is shown.

After you enter information in the Add or Remove Program Licenses Wizard, **Inventory and License Tracker** is implemented as a *Windows Service*, monitoring and reporting licensing compliance from that point on.

Inventory and License Tracker, together with the License Report, gives you the necessary information to ensure license compliance. If *Sitekeeper* finds you are not in compliance, you can purchase the appropriate licenses or, if need be, uninstall copies of products to ensure compliance.

As an additional benefit, **Inventory and License Tracker** catches incidents of users installing and running programs locally without your approval. All licensing information is reported only to you. It is **not** transmitted outside your organization.

Use the Scan Schedule Wizard to determine how often and at what time of day your managed machines are scanned to provide Inventory and License Tracker with information.

PushInstaller

The **PushInstaller** module enables administrators to easily install or uninstall programs, updates, upgrades and patches which are logo-compliant for *Windows 2000* and *XP* or *Microsoft-Installer*-compliant, on selected workstations throughout a site from a central location.

Note: A *Microsoft Windows* installer (.msi) file is a storage file containing the instructions and data required to install an application. Most programs developed for *Windows* NT, 2000 and *XP* systems includes this file.

From the Add or Remove Programs Wizard, you select the program to be installed or uninstalled. The program selected for installation must reside on a shared drive or drives accessible to all workstations on which the program is to be installed. You can select to install or uninstall a program immediately or later in the day when everyone has gone home. You can also select how many instances of the program are installed or uninstalled at the same time.

Getting Started Overview

To get up and running with *Sitekeeper* after installation, you need to configure the database in which *Sitekeeper* will store inventory and *PushInstall* information.

On the Configure Sitekeeper tab, click the **Configure Database** task link. The Configure Database Wizard launches. This wizard helps you select a server for the *Sitekeeper* database, then build and configure the database on that server. This process may involve installing the Microsoft Desktop Engine (MSDE), if you do not have it, Microsoft SQL 7, or SQL 2000 installed.

After you configure the *Sitekeeper* database, click **Finish**. the Manage Machines tab is available for you to establish a variety of settings and run *Sitekeeper* reports.

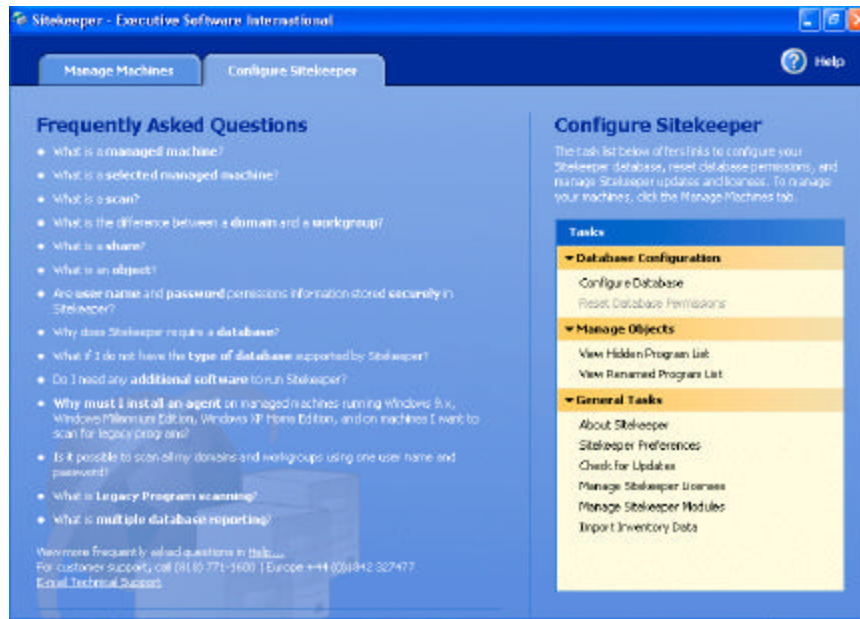
Configure Sitekeeper Tab

The Configure Sitekeeper tab offers a convenient central location for you to perform a variety of functions. The Configure Sitekeeper tab appears in two views. After installation, you are informed that before you can manage machines with *Sitekeeper*, you must configure a database.



When you select the **Configure Database** task link, a wizard guides you through the process of configuring the database where *Sitekeeper* will store and track software and hardware inventory and licensing data for machines you select to be managed.

After you configure your database, the Configure Sitekeeper tab view changes to show a list of Frequently Asked Questions and other important information.



The Configure Sitekeeper tab also features a task list from which you can set a variety of options:

Database Configuration

- **Configure Database:** After you initially specify and configure a *Sitekeeper* database, you can use this option to configure a different database.
- **Reset Databases Permissions:** You must specify the user name and password needed to access the *Sitekeeper* database. If you change this information at a later time, you will need to click this task link to update the information.

Manage Objects

- **View Hidden Programs List:** From many reports, you can specify that certain programs not appear in inventories or license reports. Click this link to view a list of all programs that you have specified not appear in reports.

- **View Renamed Programs List:** From many reports, you can customize how programs appear in report results. Click this link to view a list of all programs to which you have assigned custom names.

General Tasks

- **About Sitekeeper:** Click this link to learn the version number of *Sitekeeper* and other information.
- **Sitekeeper Preferences:** Click this link to establish settings to customize *Sitekeeper* to work in the manner that best suits you.
- **Check for Updates:** Click this link to access the *Sitekeeper* Web site where you can learn if your version of the program is the most current available.
- **Manage Sitekeeper Licenses:** Click this link to add, remove, or purchase *Sitekeeper* licenses.
- **Manage Sitekeeper Modules:** Click this link to view the number of licenses you have for each *Sitekeeper* module and other information.
- **Import Inventory Data:** Click this link to import inventory data sent from remote machines. Remote machines are machines that are not always connected to your network.

After you configure *Sitekeeper* and click **Finish**, you can perform additional functions and run reports from the Manage Machines tab.

Configuring the Sitekeeper Database

The Configure Database Wizard enables you specify the server and configure the database *Sitekeeper* will use to store and track information for your managed machines.

After you configure your database and click **Finish** on the Configure Sitekeeper tab, the Manage Machines tab is enabled and you are ready to begin using *Sitekeeper*.

Legacy Databases

Previous versions of Sitekeeper used a different database format than that used in version 2.0. If you had a previous version installed, you can migrate this data into the new database format using the Configure Database Wizard.

On the Update Legacy Database page you can specify that you want to update a legacy database to use the new format. Additionally, you can specify that a copy of the old database be saved in its current format for archival purposes. If you decide to create a copy of the specified legacy database before updating it, the copy will be renamed "ExistingDatabaseName_OLD"

➤ Running the Configure Database Wizard

If you are using a database on a remote server, you must create the directory in which the database will reside before you run the Configure Database Wizard. You cannot create a directory on a remote server from this wizard. We recommend you create a "C:\Sitekeeper" directory on the remote server for the *Sitekeeper* database.

1. From the Configure Sitekeeper tab, click the **Configure Database** task link. The Configure Database wizard appears.
2. After you read the introductory text, click **Next** to continue. If you do not want the introduction screen to appear the next time you run the wizard, select the **Do not show the Introduction screen** again checkbox. The Specify Database Location screen appears.
3. On the Specify Database Location screen, select the type of database *Sitekeeper* will use to store information for your managed machines.

If you want *Sitekeeper* to store information on an existing database location, select the I want **to use an existing SQL or MSDE server** option, click **Next**, and skip to step 5.

If you want *Sitekeeper* to store information in an Microsoft Desktop Engine (MSDE) database, and you do not yet have MSDE installed,

select the I want to **install Microsoft Desktop Engine (MSDE) locally** option and proceed to step 4.

4. Click **Install MSDE Now** to install the Microsoft Desktop Engine. If you purchased *Sitekeeper* on a CD, MSDE is included on your CD. If you purchased *Sitekeeper* online, you will be prompted to click **Open MSDE Web page** and be directed to a site where you can download MSDE. After you click **Install MSDE Now** or **Open MSDE Web page**, you will be guided through the process in either instance.

After you complete the MSDE installation, click **Next** to continue. In some instances, the MSDE installation may require a reboot. If you are instructed to reboot, close all open applications and reboot the computer. Then, restart *Sitekeeper* and begin this wizard again.

If you newly installed MSDE during the *Sitekeeper* installation, and a reboot was not required, click **Next** and proceed to step 8.

5. On the Specify Server Location screen, a list of your database servers found by *Sitekeeper* appears. Select the server on which the *Sitekeeper* database will reside.

If a server does not appear in the list, click **Specify**. A screen appears where you can enter the **Server name**. If you are specifying an SQL server, enter the machine name for the server. If the machine contains multiple instances of SQL server, the path must include the instance name, for example, "MachineName\InstanceName". If you installed MSDE from *Sitekeeper*, the instance name is SiteKeeper, so you would enter "MachineName\SiteKeeper".

Click **OK** for *Sitekeeper* to attempt to connect with the specified server. If the connection succeeds, you return to the Select Database Location screen and the specified server now appears in the list.

Click **Next** to continue.

6. On the Specify New or Existing screen, select whether you want to use an existing database or you want to create a new database. You must configure at least one *Sitekeeper* database. If you are using MSDE you can use only one database. However, if you are using SQL 7 or SQL 2000 Server, you can configure more than one database. For example, you may want to store inventory information about machines in different divisions of your company in separate databases.

Click **Next** to continue.

7. On the Logon to Database screen, enter the **User name** and **Password** needed to connect to the database. If you are using MSDE, enter a user name of "sa" and do not enter a password; leave the **Password** field blank. If you are using SQL, enter your SQL Server user name and SQL Server password. If you change your user name and password at a later date, you need to click the **Reset Database Permissions** task link on the Configure Sitekeeper tab to enter the new information. Click **Next** to continue.
8. If you selected to create a new database, the **Server location** you selected in step 5 appears for verification. You will also see this screen immediately after step 4 if you installed MSDE while installing *Sitekeeper* and a reboot was not required. Review the location to ensure this is where you want to build the *Sitekeeper* database. If you want to specify a different location, click **Back** until you return to the Specify Server Location screen.

Specify the directory location in which you want to build the database and the name you want to give the database. Remember, if you are creating the database on a remote server, the database directory must already exist. You cannot create a directory on a remote server from this wizard.

Click **Next** and skip to step 11.

9. If you selected to use an existing database, review **the Server location** and database name. The location you selected in step 5 appears for verification. Review the location to ensure it is the one

you want to use. If you want to specify a different location, click **Back** until you return to the Specify Server Location screen. After reviewing the database location and name, click **Next**.

10. If you selected to use an existing database that is from a version of *Sitekeeper* prior to 2.0, this is considered a legacy database and it must be updated to work with this version of *Sitekeeper*. If you mark the option to update the specified database, you also have the option of saving a copy of the current database in the old format for archival purposes.

If you do not want to update the specified legacy database, you must click the **Back** button until you reach the Specify Database screen and select another database or create a new one.

11. Click **Finish** to close the Configure Database Wizard.

Reset Database Permissions

During initial configuration, when you configure your *Sitekeeper* database, you are prompted to enter the user name and password (if necessary) needed to access the database. If you change your user name and password at a later date, you need to change this information in *Sitekeeper*.

To do this, click the **Reset Database Permissions** task link on the Configure Sitekeeper tab. The Reset Database Permissions screen appears. Enter your new **User name** and **Password**. **Verify** your password and click **OK** to save your new information.

Note: Be sure not to confuse database permissions with network permissions. Database permission is the user name and password used to access the *Sitekeeper* database. Network permission information is used by *Sitekeeper* to access domains or workgroups when it scans your managed machines while you are not logged into the network. For more information about network permissions, see Specifying Network Permissions.

Viewing the Hidden Programs List

Sometimes you may not want specific programs to appear in your *Sitekeeper* reports. *Sitekeeper* enables you to hide programs so that they do not appear in your inventory, license, and license compliance reports. You can hide programs in all reports, or specify that hidden programs appear in selected individual reports.

From any inventory, license, or license compliance report, you can select programs that you do not want to appear in any of your *Sitekeeper* reports. You can also unhide hidden programs through the **Manage Hidden Programs** task link on a report or the **View Hidden Program List** task link on the Configure Sitekeeper tab.

➤ Hiding a Program and Managing Hidden Programs

1. To hide a program, run a License, License Compliance, Software Inventory by Product, or Software Inventory by Machine report.
2. From the report, highlight a program you do not want to appear in any future reports, and click the **Hide Selected Programs** task link. The selected software does not appear in any future license or inventory reports.
3. You can show hidden programs in selected reports by selecting the **Hide Hidden Programs** task link. Hidden programs will appear only in the current report.
4. To view all programs you have selected to be hidden in reports, click the **Manage Hidden Programs** task link in a report, or the **View Hidden Programs List** task link on the Configure Sitekeeper tab. The Hidden Programs List screen appears.
5. To unhide a hidden program in all reports, select a hidden program, and click **Unhide**.
6. Click **Close**. The program is now unhidden and appears in all reports.

Viewing the Renamed Programs List

You may want to use a name other than the default for programs to appear in your *Sitekeeper* reports. Sitekeeper enables you to rename the programs that appear in your inventory, license, and license compliance reports.

From any one of these reports, you can select programs that you want to rename in all your *Sitekeeper* reports. You can also manage programs you have renamed - rename them again or restore the default name - through the **Manage Renamed Programs** task link on a report or the **View Renamed Program List** task link on the Configure Sitekeeper tab.

➤ Renaming a Program and Managing Renamed Programs

1. To rename a program, run a License, License Compliance, Software Inventory by Product, or Software Inventory by Machine report.
2. From the report, highlight one or more programs you want to appear with a different name in any future reports, and click the **Rename Selected Programs** task link.
3. A screen appears listing the original name of the program. Enter the name you want to appear in *Sitekeeper* reports in the **Rename as** field.
4. Click **Save and Close**. The new name replaces the original name in reports.
5. To view all programs for which you have established custom names, click the **Manage Renamed Programs** task link in a report, or the **View Renamed Programs List** task link on the Configure Sitekeeper tab. The Hidden Programs List screen appears.
6. All programs you have renamed appear with both the original name and the custom name you assigned. To change the custom name, click **Rename**. To reestablish the original name, click **Restore**.
7. Click **Close** to return to the report or the Configure Sitekeeper tab.

Sitekeeper Preferences

Sitekeeper preferences enable you set options to customize *Sitekeeper*. To access these preferences, click the **Sitekeeper Preferences** task link under General tasks on the Configure Sitekeeper tab.

You can set options to:

- **Do not alert me about missing agents.** When you specify Sitekeeper functions for managed machines that do not have the agent and require it to complete the function, a screen appears prompting you to install the agent. When you select this preference, the prompt does not appear, and screens from the Add or Remove Agent Wizard appear so you can install the agent on machines that require it.
- **Do not show wizard introduction screens.** Selecting this checkbox automatically turns off the Welcome screen of all wizards. If you do not want to turn off the Welcome screen for all wizards, you can do so in individual wizards by selecting the Do not show this page again checkbox on the Welcome screen for that wizard.
- **Do not scan or PushInstall to remote machines when they are connected to the network via dial-up or Virtual Private Connection.** Select this checkbox if you do not want to include remote machines that are connected via these methods in a scan. You may not want to include these machines because a slow connection could greatly increase the amount of time a scan takes, or because the connection could be terminated before the scan completes.

Managing Sitekeeper Licenses

A *Sitekeeper* license is needed for each machine you specify to manage with the Add or Remove Machines Wizard. The two Sitekeeper modules - *License and Inventory Tracker* and *PushInstaller* - can be licensed together or separately.

When you run the Add or Remove Machines Wizard, if *Sitekeeper* detects that the number of machines you select to manage exceeds the number of

licenses you purchased or the number available in the trial version, you are informed that you need to purchase additional licenses. You can purchase licenses immediately via the Web by clicking the **View Sitekeeper Modules** task link on the Configure Sitekeeper tab. When using the trial version, you can fully manage selected machines for 30 days.

If you have not yet purchased licenses by the last day of the trial period, a message informs you that the trial has expired and you cannot perform any *Sitekeeper* functions until licenses are purchased.

➤ **Purchasing Sitekeeper Licenses**

1. From the Configure Sitekeeper tab, click the **View Sitekeeper Modules** task link. The Sitekeeper Modules screen appears detailing how many licenses you have for each *Sitekeeper* module and how many are currently being used. If you are using the trial licenses, the number of days left in the trial is displayed. To purchase licenses click **Buy Now**. You can use trial licenses along with licenses you purchase by clicking **Try and Buy**.

If you are using trial licenses, popup messages will occasionally remind you how many days are left in the trial grace period. From a grace period reminder message, you can also click **Buy Now**.

2. Your Web browser is activated and directed to a site where you can purchase *Sitekeeper* licenses. The actual site may vary according to where you initially purchased *Sitekeeper* or where you most recently purchased licenses.
3. After you complete your transaction for purchasing additional licenses on the Web site, you will receive an e-mail including the license files. You are instructed to copy the license files into the *Sitekeeper* directory on the machine containing the *Sitekeeper* console. After you copy the license files, use the **Manage Sitekeeper Licenses** task link on the Configure Sitekeeper tab to activate them.

➤ Adding and Removing Sitekeeper Licenses

1. From the Configure Sitekeeper tab, click the **Manage Sitekeeper Licenses** task link. The Sitekeeper Licenses screen appears.

This screen displays the number of licenses you currently have and how many are in use. The grid displays detailed information on the licenses which are currently active.

2. To activate new license(s) you purchased, click **Add**. The Open a Signed License File screen appears. If necessary, use the **Look in** field to browse to the directory where you saved the new licenses.
3. Licenses appear with the .slf (software license file) extension. Select the new license(s) and click **Open**. The Sitekeeper Licensing screen appears. The Sitekeeper Licensing screen confirms the number of licenses you activated.
4. Click **Summary** to see if the number of licenses you have matches the number of machines being managed. The Licenses Summary screen shows the number of licenses you currently have, the number you have installed, and whether you have any more available or need more licenses according to the number of machines you selected for *Sitekeeper* to manage.
5. Click **Close** to exit the Sitekeeper Licenses screen and return to the Configure Sitekeeper tab.

Managing Sitekeeper Modules

Sitekeeper consists of two individually licensed modules: *Inventory and License Tracker*, and *PushInstaller*. These components are licensed per managed machine. Licensing information is hosted in the *Sitekeeper* console. The two components can be licensed together or separately.

To view details about licenses you own, or to purchase licenses, click the **Manage Sitekeeper Modules** task link on the Configure Sitekeeper tab. The Sitekeeper Modules screen appears showing the number of licenses you have for each module, the number in use, and if you are using the trial version

of *Sitekeeper*, the number of days left in the trial period. You can select a module and click **Buy Now** to access a Web site where you can purchase *Sitekeeper* licenses.

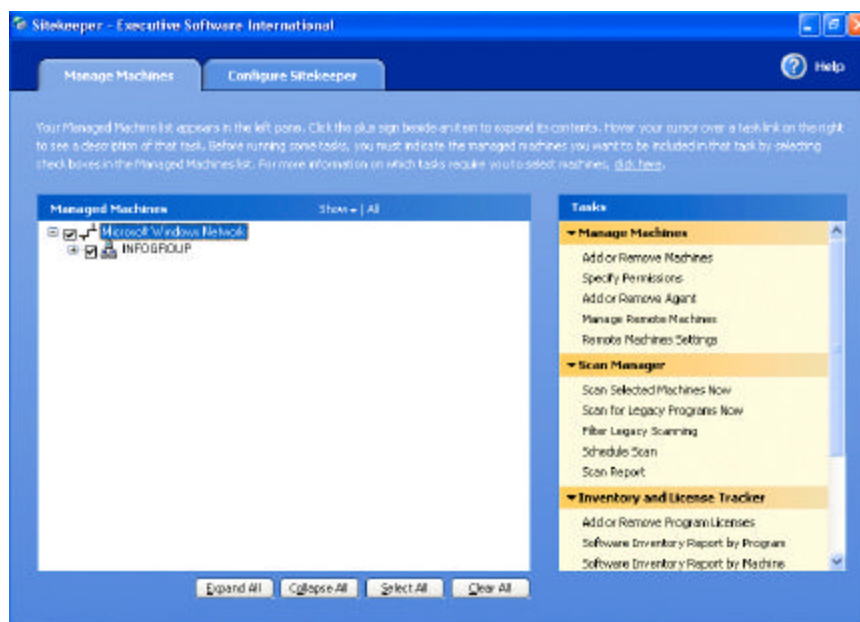
Importing Inventory Data

When users of remote machines send inventory data via e-mail or media such as floppy disk, you must import the inventory into *Sitekeeper*. If you received the .ski file as an e-mail attachment, first save it to a location you can access from the *Sitekeeper* console machine.

To import the data, select the **Import Inventory Data** task link on the Configure Sitekeeper tab. The Open screen appears. Browse to the location where the inventory information is saved, or to the drive containing the media (CD or floppy disk) on which it is located. Click the .ski file to import it into *Sitekeeper*.

Manage Machines Tab

The Managed Machine tab offers a central location for you to manage a variety of *Sitekeeper* functions.



The pane on the left displays the machines you select for *Sitekeeper* to manage. You can click a plus sign beside an item to expand views individually, or you can **Expand all** items. You can also **Collapse all** items.

When you are preparing to scan selected managed machines for information, you can **Select all** managed machines, or you can **Clear all** checkboxes and manually select individual checkboxes.

From the task list on the right, you can select from the following task categories:

Manage Machines

- Add or Remove Machines
- Specify Permissions

- Add or Remove Agent
- Manage Remote Machines
- Remote Machines Settings

Scan Manager

- Scan Selected Machines Now
- Scan for Legacy Programs Now
- Filter Legacy Scanning
- Schedule Scan
- Scan Report

Inventory and License Tracker

- Add or Remove Program Licenses
- Multiple Database Reporting
- Software Inventory by Program
- Software Inventory by Machine
- Hardware Inventory by Device
- Hardware Inventory by Machine
- License Report

PushInstaller

- Add or Remove Programs
- Add or Remove Programs Report

Adding and Removing Machines

The Add or Remove Machines Wizard enables you to specify the machines on your network you want *Sitekeeper* to manage. Before you run the wizard, you should prepare a list of machines you want to include on *Sitekeeper's* managed machine list. You must have administrative privileges for each machine *Sitekeeper* will manage.

➤ Running the Add or Remove Machines Wizard

1. From the Manage Machines tab, click the **Add or Remove Machines** task link. The Add or Remove Machines Wizard appears.
2. After you read the introductory text, click **Next** to continue. If you do not want the introduction screen to appear the next time you run the wizard, select the **Do not show the Introduction screen again** checkbox.
3. On the Specify machines screen, select checkboxes to indicate the machines you want to manage. You can click **Expand All** or **Collapse All** to change the display of your network in the treeview. If you want to monitor all machines on your network, click **Select All**. To clear all checkboxes in the treeview, click **Clear All**.
4. If you want to add machines or domains (network objects) that are associated with your network, but are perhaps currently hidden from the browsing list due to security or not currently connected to the network, click **Add**. The Add Network Object screen appears.
5. If you want to specify a machine by name, select the **I want to enter a machine path** option and enter the complete **Path** of a particular machine. The name must be entered as “//Domain name/machine name”.
6. To specify a machine, or group of machines by Internet Protocol (IP) address, select the **I want to enter an IP address or IP address range** option. In the **Domain** field, enter the name of the domain containing the machine(s) with the IP address or IP address range you want to enter. The domain can be virtual.

You can search for a single machine by entering an address in the **IP Address Start** field, or search for a group of machines by entering addresses in both the **IP Address Start** and **IP Address End** fields.

Click **OK** and you return to the Specify Machines screen. If you specified a single machine, it appears under the current selected tree. If you specified a entire domain, it is added to the tree parallel to other domains.

7. Click **Next** to continue. A status screen appears informing you that your managed machine selections are being updated. The Specify Permissions screen appears. To specify permissions, follow the instructions for running the Specify Network Permissions Wizard.
8. Click **Next** to continue. The Agent Installation appears.
9. Specify whether *Sitekeeper* should **Scan for Windows 9x machines** or **Do not scan for Windows 9x machines**. If you do want to manage Windows 9x, ME, or XP Home machines, the process may take a few minutes. If you specify to manage any machines running Windows 9x, ME, or XP Home, you must install an agent on them before you can include them in inventory reports or PushInstall software to them.

If you select to Scan these machines machines, follow the instructions for running the add or remove agent wizard.

10. Click **Finish** to close the Add or Remove Machines Wizard.

Specifying Network Permissions

After you specify and configure your *Sitekeeper* database, you must set permissions for *Sitekeeper* to scan your managed machines when you are not logged into the network.

After you finish specifying permissions, you can set up a scan schedule to determine how often, and at what time, your managed machines are scanned.

Trust Domains

When one domain "trusts" another, the user name and password defined in the "trusted" domain can be used for authentication and authorization in the "trusting" domain(s).

Sitekeeper supports trust domains. This means that if you set up your domains under a single trust domain, you can its permission information to scan all your domains, instead of entering permission information for each individual domain.

To add a trust domain into Sitekeeper, first select it in the Add or Remove Machines Wizard, using the Add Network Object screen. Then, enter the permissions information for the trust domain in the Specify Permissions Wizard.

➤ Running the Specify Permissions Wizard

Different user names and passwords may be required for each domain or workgroup containing machines that you have selected for *Sitekeeper* to manage. The Specify Permissions Wizard guides you through this process. Your information is encrypted and cannot be accessed by any other users of the network.

1. From the Manage Machines tab task list, click the **Specify Permissions** task link. The Specify Permissions Wizard appears.
2. After you read the introductory text, click **Next** to continue. If you do not want the introduction screen to appear the next time you run the

wizard, select the **Do not show the Introduction screen** again checkbox.

3. On the Specify Permissions screen, a grid appears containing the objects *Sitekeeper* found on your network. Select one or more items and click **Specify type** to indicate whether the item is a **Domain** or a **Workgroup**.

Note: A domain is a collection of computers sharing a common domain database and security policy. Each domain has a unique name. Users can log in to the domain to gain access to all its resources, even though the resources may be located on different servers in the network. A workgroup is a group of users sharing files while working on a common project, often over a local area network.

4. After you specify the type of one or more items, click **Specify Permissions**. A screen appears for you to enter the **User name** and **Password** to gain access to the domains or workgroups. You can click a button for these permissions to **Apply to Selected** domains or workgroups or **Apply to All** domains and workgroups, even if you did not select them on the Specify Permissions screen.
5. After you enter the permissions information and specify whether it should apply to selected items or all items, you return to the Specify Permissions Wizard and your information appears in the grid. If you want to change all permissions, click **Clear Permissions**. Click **Next** to continue.
6. Click **Finish** to close the Specify Permissions Wizard. If you change your user name or password, or add managed machines on a domain or workgroup for which you did not yet specify permissions, you will need to run the Specify Permissions Wizard again.

About the Sitekeeper Agent

The *Sitekeeper* agent is a small application that enables the **PushInstaller** and **Inventory and License Tracker** to work on certain machines in three categories:

- Machines running Windows 9x, Windows Millennium Edition (ME), or Windows XP Home Edition, require an agent to be included in inventory reports or to PushInstall software.
- To enable scanning of remote machines that are not always connected to your network (for example, laptops that are connected to the network when in the office, but are not connected when taken on business trips), the agent must be installed on them. This enables these machines to send inventory information directly to *Sitekeeper* when they are connected to the network, and to send inventory information via e-mail or media such as floppy disc when they are not.
- For machines on which you want to enable scanning for legacy programs, you must also install the agent. Legacy programs are DOS programs and older Windows programs that either place no information at all in the registry, or do not follow standard Windows conventions in where they place information in the registry.

There are two ways you can install the agent: automatically and manually. The automatic installation uses the *PushInstaller* to install the agent on selected machines. Because the *PushInstaller* requires the agent in order to work on machines running Windows 9x, Windows Millennium Edition (ME), or Windows XP Home Edition, the agent must be installed manually from a share, Web site, or CD on those machines.

The agent does not need to be installed on managed machines running Windows NT, 2000, or XP Pro that are always connected to your network, or on machines for which you do not want to enable legacy program scanning.

Agent installation is managed through the Add or Remove Agents Wizard. Certain screens from this wizard will appear when you specify *Sitekeeper* functions for managed machines that do not have the agent and require it to complete the function. At this time, you can specify to install the agent now,

or wait until later. Additionally, you can specify in *Sitekeeper* preferences that this screen not appear.

Adding and Removing the Sitekeeper Agent

The Add or Remove Agents Wizard may automatically appear when you select machines running Windows 9x, Windows Millennium Edition (ME), or Windows XP Home Edition - or when you configure scanning for remote machines that are not always part of your network. You must also install the agent on machines you want to scan for legacy programs. You can use the PushInstaller to install agents on some machines, but you must manually install the agent on machines running Windows 9x, Windows Millennium Edition (ME), or Windows XP Home Edition.

➤ Running the Add or Remove Agent Wizard

1. From the Manage Machines tab, click the **Add or Remove Agent** task link. The Add or Remove Agents Wizard appears.
2. After you read the introductory text, click **Next** to continue. If you do not want the introduction screen to appear the next time you run the wizard, select the **Do not show this page again** checkbox.
3. Specify whether you want to **install the agent** on the selected machines or **uninstall the agent** on the selected machines.

Click **Next** to continue. If you selected to install the agent, proceed to the next step in this procedure. If you selected to uninstall the agent, skip to step 10.

4. If any of the machines you selected to manage are running Windows NT, Windows 2000, or Windows XP Professional, the next screen that appears is the Specify Share screen. Since you can PushInstall to a Windows NT or greater machine without an agent, the automatic method is used for adding the agent and this screen is used to define the PushInstall job.

Unless previously changed, the default share path location is the local machine's SKAgent share. This share was setup during the initial

installation of *Sitekeeper*. If the default has been changed, browse to the UNC path of the share on the local machine or some other share that contains the agent installation files. Also, enter any necessary permissions the agent machines need to connect to the UNC share.

If you only selected machines running Windows NT, Windows 2000 or Windows XP Professional, then skip to step 11.

If you selected any machines running Windows 9x, Windows Millennium Edition (ME), or Windows XP Home Edition, a screen appears with those machines in the treeview. You can click a plus sign beside an item to expand views individually, or you can **Expand all** items. You can also **Collapse all** items. You can **Select all** machines in the list, or you can **Clear all** checkboxes and manually select individual checkboxes.

Because you cannot PushInstall to machines running Windows 9x, Windows Millennium Edition (ME), or Windows XP Home Edition, you are given the option of installing the agent on these machines **now** or **later**. If you select **now**, proceed to the next step to configure a manual installation. If you select **later**, selected screens from the Add or Remove Programs Wizard will appear for you to configure a PushInstall of the agent on remote machines and machines on which you want to enable legacy scanning.

5. On the Specify Method screen, select how you want to install the agent on selected machines. You can select an option to **E-mail the installation information to users** or you can **Save** the installation package to a shared folder or to a CD or other external media.

Click **Next** to continue. If you selected to e-mail the installation information, proceed to the next step of this procedure. If you selected to save the installation package, skip to step 9.

6. On the Agent E-mail Instructions screen, you must then choose whether you want to **E-mail an internal link** or **E-mail an external link**. If you are using an internal link, the **Path** defaults to the location of the *Sitekeeper* agent created when the program was installed. If you moved the agent to a new shared location, use the **Browse**

button to locate the SKAgent.msi file in the new location. Be sure that all users who need to install the agent have the necessary permissions to access the share. If you are e-mailing an external link, users must have Internet connectivity, because they are directed to a Web site where they can launch the agent installation package.

7. When you click **Send E-mail**, your e-mail program opens with a default message containing instructions on how to install the agent, and the location of the installation package - either the share on your network or the Web site - depending on which option you selected. You must enter the e-mail addresses of users you want to install the agent.
8. After you send the e-mail and return to the Agent E-mail Instructions screen, click **Next** to continue. Skip to step 12 of this procedure.
9. If, on the Specify Method screen, you selected to **Save** the installation package to a remote location, or to external media, you can save the installation package to another location (you may not want to share the original location on the *Sitekeeper* console machine) or to a CD that you can distribute among your users.

Click the **Save to** button to access a screen where you can select the location in which you want to save the installation package. Click the **Edit Instructions** button to view, print, or copy the instructions. For example, you may want to distribute a hard copy of the instructions along with the CD containing the installation package.

If you select to save the installation package to a remote shared location, you can run this wizard again if you want to e-mail the location, along with instructions for running the installation package, to your users.

Click **Next** to continue.

10. If you want to uninstall the agent from selected machines, you must indicate the **Share path** to the directory on the Sitekeeper console machine in which the agent is located (or specify a new path if you moved or copied the agent).

The path defaults to the location created when the program was installed. If you change the default, the new share path must be a full network path. When you click **Browse**, you must browse to your network, then to your share, and then to the setup.exe for the agent. Specify the **Domain** name and any permissions needed to access the specified share.

Click **Next** to continue.

11. On the Specify Schedule screen, indicate the date and time you want to begin uninstalling the agent on the selected machines. You can also specify whether you want the uninstall to end at a certain time. Specifying an end time does not mean the uninstall will go more slowly to fill the entire time frame you select. However, the uninstall will terminate at that time even if it has not completed for some reason.

Click **Next** to continue.

12. Click **Finish** to close the Add or Remove Agent Wizard.

Remote Machines

Remote machines are machines that are not always connected to your network. These may include laptop computers that are sometimes taken home or on business trips by your users, or machines that are not always connected to the network for security reasons. Before you can gather inventory information and PushInstall programs for remote machines, you must install the *Sitekeeper* agent on them.

Managing Remote Machines

To specify that a machine is a remote machine, use the Manage Remote Machines Wizard. This wizard enables you to specify whether machines are local (always connected to the network), or remote (not always connected).

➤ Running the Manage Remote Machines Wizard

1. From the Manage Machines tab task list, click the **Manage Remote Machines** task link. The Manage Remote Machines Wizard appears.
2. After you read the introductory text, click Next to continue. If you do not want the introduction screen to appear the next time you run the wizard, select the **Do not show the Introduction screen again** checkbox.
3. Select whether **I want to make the selected managed machines remote** or **I want to make the selected managed machines local**.

If you selected any machines that are already remote and specify to make them remote here, the settings will remain unchanged for those machines. Settings for selected machines that are already local will also remain unchanged if you specify to make them local here.

To continue, click **Next**.

4. On the View or Edit Settings screen you can edit settings that affect all your remote machines (not just those you selected during this session), you can also change these settings by clicking the Remote Machines Settings task link on the Manage Machines tab.

Select either **Yes, I want to view or edit global remote machine settings now** or **No, I do not want to view or edit global remote machine settings**. If you select yes, you can configure how Sitekeeper exchanges information with remote machines. For more information, see running the Remote Machine Settings Wizard.

To continue, click **Next**.

5. Specify how the agent on the remote machines will send inventory data to *Sitekeeper* during intermittent and extended periods of network connectivity.

Note: The intermittent options are only available on remote machines running Windows 2000 or XP. Machines running prior versions of Windows must send inventory data manually via e-mail attachment or media such as floppy disc.

For Intermittent Network Connection Settings, the **Send schedule** option enables you to control when inventory data is sent to the target *Sitekeeper* console during a period of intermittent connections.

Additionally, specify the **Minimum amount of bandwidth** that will enable the inventory information to be sent in an amount of time that is acceptable to you.

6. The Extended Network Connection Settings options enable you to specify how often (**Frequency**), and at what **Time** inventory data is sent to the target console when the remote machine is connected to the network for extended periods.

Click **Next** to continue.

7. Specify the target **E-mail address** of who should receive inventory information sent by remote machine users who select to update inventory data via e-mail. Remote users will send the information to the address you enter here. When users of remote machines send you inventory information via e-mail or media such as floppy disk, you must import that data into *Sitekeeper*.

Click **Next** to continue.

8. If any of your remote machines are currently unavailable (not connected to the network), and therefore cannot be updated automatically, specify how you want to update them. Machines are automatically updated the next time users log onto the network. If you do not want to wait for users to log on, you can specify to send the update via **e-mail**, or to save the update to **media** and sent it via courier.

Click **Next** to continue.

9. If you selected to update the settings via e-mail, a screen appears to enable this. Click **Send E-mail** to open your e-mail program and send the updated remote machines settings via e-mail. The updated settings are sent as an attachment with the ".sac" extension. You must enter the individual address of each user of a remote machine that you want to update.

If you selected to save the update to media, a screen appears to enable this. Click **Save as** to save the settings as a ".sac" file. You can then distribute the settings via courier to individual users of remote machines that were unavailable for automatic update.

When you distribute the .sac file either by e-mail or media, users of remote machines that you want to update will need to double-click the file to run it. From that point on the update will be automatic and users need not do anything further.

Click **Next** to continue.

10. If you selected to make any managed machines remote and the machines do not already have the *Sitekeeper* Agent installed on them, screens for the Add or Remove Agent Wizard will appear.
11. Click **Finish** to close the Manage Remote Machines Wizard.

Remote Machine Settings

After you specify your remote machines, use the Remote Machines Settings Wizard to establish the *Sitekeeper* target console for machines. Multiple instances of the *Sitekeeper* console can be present on the network. The target console is the console from which a specific remote machine is managed.

You can also configure how remote machines will send inventory information to *Sitekeeper*, and how remote machines will receive update information from *Sitekeeper*.

➤ Running the Remote Machine Settings Wizard

1. From the Manage Machines tab task list, click the **Remote Machine Settings** task link. The Remote Machine Settings Wizard appears.
2. After you read the introductory text, click **Next** to continue. If you do not want the introduction screen to appear the next time you run the wizard, select the **Do not show the Introduction screen again checkbox**.
3. Specify how the agent on the remote machines will send inventory data to *Sitekeeper* during intermittent periods of network connectivity.

Note: The intermittent options are only available on remote machines running Windows 2000 or XP. Machines running prior versions of Windows must send inventory data manually via e-mail attachment or media such as floppy disc.

For Intermittent Network Connection Settings, the **Send schedule** option enables you to control when inventory data is sent to the target Sitekeeper console during a period of intermittent connections.

Additionally, specify the **Minimum amount of bandwidth** that will enable the inventory information to be sent in an amount of time that is acceptable to you.

Note: If a machine is connected to the network via a dial-up or Virtual Private Network (VPN) connection, specify a minimum bandwidth the connection must have to transfer the inventory data in an amount of time you find acceptable. The default minimum amount would enable an average inventory to be sent in about three minutes. You can use the default or specify a different bandwidth as a minimum. Additionally, you can specify in **Preferences** that machines not be scanned when connected via dial-up or VPN.

Click **Next** to continue.

4. Specify how the agent on the remote machines will send inventory data to *Sitekeeper* during extended periods of network connectivity. The Extended Network Connection Settings options enable you to specify how often (**Frequency**), and at what **Time** inventory data is sent to the target console when the remote machine is connected to the network for extended periods.

Click **Next** to continue.

5. Specify the target **E-mail address** of who should receive inventory information sent by remote machine users who select to update inventory data via e-mail. Remote users will send the information to the address you enter here. When users of remote machines send you inventory information via e-mail or media such as floppy disk, you must import that data into *Sitekeeper*.

Click **Next** to continue.

6. If any of your remote machines are currently unavailable (not connected to the network), and therefore cannot be updated automatically, specify how you want to update them.

Machines are automatically updated the next time users log onto the network. If you do not want to wait for users to log on, you can specify to send the update via **e-mail**, or to save the update to **media** and sent it via courier.

Click **Next** to continue.

7. If you selected to update the settings via e-mail, a screen appears to enable this. Click **Send E-mail** to open your e-mail program and send the updated remote machines settings via e-mail. The updated settings are sent as an attachment with the ".sac" extension. You must enter the individual address of each user of a remote machine that you want to update.

If you selected to save the update to media, a screen appears to enable this. Click **Save as** to save the settings as a ".sac" file. You can then distribute the settings via courier to individual users of

remote machines that were unavailable for automatic update.

When you distribute the .sac file either by e-mail or media, users of remote machines that you want to update will need to double-click the file to run it. From that point on the update will be automatic and users need not do anything further.

Click **Next** to continue.

8. Click **Finish** to close the Remote Machines Settings Wizard.

Importing Information from Remote Machines

When users of remote machines send inventory data via e-mail or media such as floppy disk, you must import the inventory into *Sitekeeper*. If you received the .ski file as an e-mail attachment, first save it to a location you can access from the *Sitekeeper* console machine.

To import the data, select the **Import Inventory Data** task link on the Configure Sitekeeper tab. The Open screen appears. Browse to the location where the inventory information is saved, or to the drive containing the media (CD or floppy disk) on which it is located. Click the .ski file to import it into *Sitekeeper*.

Scanning Selected Managed Machines

For **Inventory and License Tracker** to obtain information from your managed machines, *Sitekeeper* must scan them. You can scan selected managed machines whenever you like. To do so, from the Manage Machines tab, select the machines you want to scan. Click the **Scan Selected Machines** task link from the task list on the right to gather inventory information about standard programs and hardware devices.

If you want to scan for Legacy Programs, click the **Scan for Legacy Programs Now** task link.

When the scan is complete, a Scan Report appears indicating whether all selected machines were scanned successfully. After you scan selected machines, you can view software and hardware inventory reports, and license reports for those machines.

You can also configure scans of all your managed machines at regular intervals. For more information, see the following section “Scheduling Scans of Managed Machines.”

Scheduling Scans of Managed Machines

Using the Schedule Scan Wizard, you can specify at what time and how often *Sitekeeper* scans your managed machines.

You can schedule two types of scans:

- Standard scanning gathers program and hardware inventory information from the registries of managed machines.
- Legacy scanning gathers information about DOS programs and Windows programs that do not place information in the registry, or place information in a non-standard registry location.

Use the Schedule Scan Wizard to configure both types of scans.

➤ Running the Schedule Scan Wizard

1. From the Manage Machines tab task list, click the **Schedule Scan** task link. The Schedule Scan Wizard appears.
2. After you read the introductory text, click **Next** to continue. If you do not want the introduction screen to appear the next time you run the wizard, select the **Do not show the Introduction screen** again checkbox.
3. Specify whether you want to **scan for standard programs and hardware inventory** or **scan for legacy programs**, or both.

Machines on which you want to conduct legacy scans must have the *Sitekeeper* agent installed on them. Because this type of scan may require the agent to be installed on certain machines, it may take

longer and use more network resources than a standard scan.

Click **Next** to continue.

4. On the Specify Scan Schedule screen, in the **Scan Schedule** fields specify how often and at what time you want to scan all your managed machines so that *Sitekeeper* can collect inventory and licensing information for them.

Click **Next** to continue.

5. If you selected to scan for legacy programs and one or more managed machines needs to have the agent installed or upgraded, the Agent Installation screen appears. Specify whether you want to **install or upgrade the required agent now** or **install the agent later** (using the Add or Remove Agent Wizard). If you select to install the agent **now**, when you click **Next**, you can configure a PushInstall for the agent.
6. Click **Next** to continue. A status screen appears informing you that *Sitekeeper* is saving your scanning schedule according to your selections.
7. Click **Finish** to close the Schedule Scan Wizard.

Legacy Program Scanning

Legacy scanning enables *Sitekeeper* to search areas of managed machines normal scanning cannot reach. Standard scanning searches only the registries of managed machines to gather inventory information. Many DOS programs and older Windows programs either place no information at all in the registry, or do not follow standard Windows conventions in where they place information in the registry. The Legacy Scanning Wizard enables you to scan for these programs.

You can specify the types of files you want to look for, and where you want to look for them by creating filter statements. *Sitekeeper* includes several default filter statements, You cannot edit or delete these, but you can write new filter statements.

For more information, see the following section, “Filter Statements for Legacy Scanning”.

Filters for Legacy Scanning

Legacy scanning enables you to search areas of managed machines normal scanning cannot reach. By eliminating areas of machines in which you know no program information that you need exists, or filtering out file types which you have no interest scanning, you can greatly reduce the amount of time a legacy scan takes. You can filter by name, date created, folders, subfolders, extension, and size.

How Filters Are Processed

Sitekeeper follows a filtering hierarchy based on the **Type** of filter and the order of the filters in the Specify Filters list on the Specify Scan Filters screen.

Essentially, when *Sitekeeper* scans a machine for legacy programs, it determines which files meet the criteria of the first filter and which do not. If the first filter is inclusive (an action of Scan applications), the files that pass through the filter are considered valid for inclusion in Legacy Program Reports. Files that do not pass through the filter are not included in the report. If the filter is exclusive (an action of Do not scan applications), files it specifies are not valid for reports and all remaining files are valid and included in reports.

Sitekeeper then scans only those files that are still valid (those that passed through the first filter) and processes the second filter, eliminating any files that do not pass through that filter. Sitekeeper continues this process for all defined filters. After all the filters are processed, valid files that pass through all filters are included in Legacy Program Reports.

Filters are essentially broken down into three groups by Sitekeeper as it scans remote machines. Here is how those groups are processed:

- The first group consists of filters with a **Type** of "in folders" (folder filters). These overwrite all other filters no matter where the others appear on the on the list. Folder filters are processed in order. If there is

more than one, the top one overwrites any below it. If one filter contradicts another, *Sitekeeper* will base the valid files on which filter comes first.

- The second group consists of filters with a **Type** of "whose extensions" (extension filters). These overwrite all others except folder filters no matter where they are on the list. Extension filters are processed in order. If there is more than one, the top one overwrites any below it. If one filter contradicts another, *Sitekeeper* will base the valid files on which filter comes first.
- After these first two filter groups are processed, if the **Action** "Scan applications" has not been specified in a user added filter (excluding folder and extension filters), all files are valid against the filter list and will be included in the report (if they have not been filtered out by the default filters).

If the **Action** "Do not scan applications" has been specified in a user defined filter and a file fits the type specified, it is invalid. No further checking will be performed and the file will not be included in the report.

- The third filter group consists of three subgroups that are processed when an Action of "Scan applications" is specified in a user defined filter:
 - File name filters ("whose name")
 - File size filters ("whose size")
 - File date filters ("created")

When processing this group (three subgroups) all files are treated as invalid until they satisfy any conditions specified in the user defined filter. All three subgroups need not be specified. For example if filters specify to scan applications based on name and size, but not date created, Sitekeeper will not check for dates and will include files that meet the first two criteria in the Legacy Program Report.

After all filters have been processed, all remaining valid files appear in Legacy Program Reports.

Creating Filters and Disabling Default Filters

Sitekeeper comes with several default filters. These filter statements cannot be edited or removed. However, you can disable them by creating filters that negate them and placing those filters before the default rules in the Filters grid when you run the Legacy Program Scan Wizard.

For example, one default rule is built as follows:

In the **Action** field, "Scan applications"

In the **Type** field, "whose extensions"

In the **Criteria** field, "are named"

In the **Value** field, ".COM"

You may not want to search for files of the type: ".com". To prevent this, you can click **Add** on the Specify Scan Filters screen. On the Add Scan Filter screen, you could build the following statement:

- In the **Action** field, select "Do not scan applications"
- In the **Type** field, select "whose extensions"
- In the **Criteria** field, select "are named"
- In the **Value** field, select ".COM"

Click **Apply** to save your statement. Your completed filter statement reads "Do not scan applications whose extensions are named COM." By selecting this rule in the Specify Filters grid, and clicking the **Move Up** button until it is above the default rule, you are effectively negating the default - no files ending in ".com" will be scanned.

Additionally, when you select "in folders" in the **Type** field, you can select environment variables as criteria for your filter statements. Environment variables are strings that contain information such as drive, path, or file name. Environment variables control the behavior of various programs.

For more information about where to specify filters, see the following procedure "Running the Legacy Program Scan Wizard."

➤ Running the Legacy Program Scan Wizard

1. From the Manage Machines tab task list, click the **Configure Legacy Scanning** task link. The Legacy Application Scan Wizard appears.
2. After you read the introductory text, click **Next** to continue. If you do not want the introduction screen to appear the next time you run the wizard, select the **Do not show the Introduction screen again** checkbox.
3. On the Specify Scan Filters screen, you can specify the types of files you want to scan for and where on the machines you want to look for these files. To create a new filter statement, click **Add**. The Add scan filter screen appears.
4. On the Add Scan Filter screen, you can build "filter statements" that filter legacy scanning. Create statements by selecting entries in the **Action**, **Type**, **Criteria**, and **Value** fields. For information about building filter statements, see creating filter statements.
5. After you create a statement, click **Apply** to save the filter statement and keep the Add Scan Filter screen open or **OK** to save your filter and return to the Specify Filters screen.
6. On the Specify Filters screen, the order in which the filters appear is the order in which Sitekeeper processes them. Select a rule and click **Move Up** or **Move Down** to change the order. You cannot edit the default filters, but you can negate them by creating a statement with the opposite filters and placing it before the default filter.

Click **Next** to continue.
7. Click **Finish** to close the Legacy Program Scan Wizard.

Adding and Removing Program Licenses

The Add or Remove Licenses Wizard gives you the ability to manage your program licenses. You can use it, together with the License Report, to ensure you maintain license compliance.

Before running this wizard, you should compile a list of the programs licensed and the number of licenses purchased per program. Although not required, we recommend you also list the serial numbers or product keys applicable to each license.

➤ **Running the Add or Remove Program Licenses Wizard**

1. From the Manage Machines tab task list, click the **Configure Legacy Scanning** task link. The Legacy Application Scan Wizard appears.
2. After you read the introductory text, click **Next** to continue. If you do not want the introduction screen to appear the next time you run the wizard, select the Do not show the Introduction screen again checkbox.
3. On the Specify Scan Filters screen, you can specify the types of files you want to scan for and where on the machines you want to look for these files. To create a new filter statement, click **Add**. The Add scan filter screen appears.
4. On the Add Scan Filter screen, you can build “filter statements” that filter legacy scanning. Create statements by selecting entries in the **Action, Type, Criteria, and Value** fields.
5. After you create a statement, click **Apply** to save the filter statement and keep the Add Scan Filter screen open or **OK** to save your filter and return to the Specify Filters screen
6. On the Specify Filters screen, the order in which the filters appear is the order in which *Sitekeeper* processes them. Select a rule and click **Move Up** or **Move Down** to change the order. You cannot edit the default filters, but you can negate them by creating a statement with the opposite filters and placing it before the default filter.

Click **Next** to continue.

7. Click **Finish** to close the Legacy Program Scan Wizard.

Multiple Database Reporting

Multiple database reporting enables you to include multiple *Sitekeeper* databases in individual inventory reports.

Reports you create by selecting a report task link on the Manage Machines tab include only information about the machines that appear in the Managed Machines pane and store information in the single database you created and/or configured on the Configure Sitekeeper tab.

Sometimes you may need to compile reports from more than one *Sitekeeper* database. For example, your company may maintain information about its accounting division machines in one *Sitekeeper* database and its development division machines in another separate *Sitekeeper* database. Although you may usually maintain information about these divisions separately, you might sometimes need to gather information in one report for both divisions. Multiple database reporting enables you to do this.

By selecting the **Multiple Database Reporting** task link on the Manage Machines tab, you access the Multiple Database Reporting screen. On this screen your *Sitekeeper* databases appear in the **Databases** grid. Select the type of report you want to run, specify the databases you want to include in the report, and click View Report to see the report with data from all the selected databases. To include additional databases, click **Add** to run the Add Database Wizard.

➤ Running the Add Database Wizard

1. From the Manage Machines tab task list, click the **Multiple Database Reporting** task link. The Multiple Database Reporting screen appears.
2. Note the specified *Sitekeeper* databases list in the Databases grid. To include additional *Sitekeeper* databases, click **Add**. The Add Database Wizard appears.
3. After you read the introductory text, click **Next** to continue. If you do not want the introduction screen to appear the next time you run the wizard, select the **Do not show the Introduction screen again** checkbox.

4. On the Specify Server Location screen, a list of your database servers found by *Sitekeeper* appears. Select the server on which the *Sitekeeper* database you want to add resides and select the database name.

If a server does not appear in the list, click **Specify**. A screen appears where you can enter the **Server name**. If you are specifying an SQL server, enter the machine name for the server. If the machine contains multiple instances of SQL server, the path must include the instance name, for example, "MachineName\InstanceName". If you installed MSDE from *Sitekeeper*, the instance name is SiteKeeper, so you would enter "MachineName\SiteKeeper".

Click **OK** for *Sitekeeper* to attempt to connect with the specified server. If the connection succeeds, you return to the Select Database Location screen and the specified server now appears in the list.

Click **Next** to continue.

5. On the Logon to Database screen, enter the **User name** and **Password** needed to connect to the database.

Click **Next** to continue.

6. Review the **Server Location** and enter the **Database Name** you want to include in multiple database reporting. After reviewing the database location and name, click **Next**.
7. On the Database Description page, enter a short **Description** of the specified database. This is how the database will be described in **Description** column on the **Databases** grid of the Multiple Database Reporting screen.

Click **Next** to continue.

8. If you want to add another database at this time, click **Yes, I want to add another database** and repeat steps 4 through 7. If you do not want to add another database at this time, click **No, I do not want to add another database**.

Click **Finish** to close the Multiple Database Reporting Wizard.

9. You return to the Multiple Database Reporting screen. The selected database now appears in the **Databases** grid.

Adding and Removing Programs

The Add or Remove Programs Wizard gives you the ability to use PushInstaller to add or remove programs on remote managed machines on your network. If you are installing a program, before running the wizard you must create a share on the directory on your machine in which the program to be installed is located.

Important: When you uninstall a program, you must use the same package with which you installed it. For example, if you installed version 1.0 of a product, you must use version 1.0 to uninstall the product.

After the install or uninstall, you can view the Add or Remove Program Report to see detailed information about how many instances of the selected program were added or removed.

Important: If you select to add or remove programs, but an install or uninstall has already been scheduled and not yet executed, the previously scheduled one will be canceled. Additionally, after you schedule a new install or uninstall, you can no longer generate a report for the previous install or uninstall. If you want a report, you should generate it before scheduling a new install or uninstall.

➤ Running the Add or Remove Programs Wizard

Before you run this wizard, you should select the managed machines on which you want to install or uninstall a program. If you are installing a program, you must create a share on the directory on your machine in which the program to be installed is located.

1. On the Manage Machines tab, select the machines on which you want to install or uninstall programs
2. Click the **Add or Remove Programs** task link. The Add or Remove Programs Wizard appears.
3. After you read the introductory text, click **Next** to continue. If you do not want the introduction screen to appear the next time you run the wizard, select the **Do not show the Introduction screen** again checkbox.
4. On the Indicate Action screen, specify whether you want to **install a program** or **uninstall a program**. Click **Next** to continue.

Important: When you uninstall a program, you must use the same package with which you installed it. For example, if you installed version 1.0 of a product, you must use version 1.0 to uninstall the product.

5. On the Select Program screen, indicate which program you want to install or uninstall. If the program does not appear in the list, click Add Programs to add it. The Add or Edit Program screen appears.
6. You must specify a command line parameter for the selected program. The command line parameter runs the install or uninstall for a selected program. To learn more about command line parameters, see “Important Terms When Adding or Removing Programs” immediately following this procedure. If you edit an existing command line parameter, it will be associated with the program for any future installs or uninstalls. If you must edit these parameters, use extreme care to ensure the information you enter is correct.

Additionally, you should mark a checkbox to specify whether **A reboot is required by the installation or uninstallation file or the installation or uninstallation command line parameter**. Click

OK to return to the Select Program screen.

Click **Next** to continue.

7. On the Specify Share screen you must enter the **Share Path**. Specify the path to where the program is located. You must share the program's directory before you can complete running this wizard. This must be a full network path. When you click Browse, you must browse to your network, then to your share, and then to the setup.exe for the selected program.

Click **Next** to continue.

8. If the program you specified to install or uninstall requires a reboot and administrator logon to complete the installation or uninstallation, you must specify the required permission information to allow the reboot and specify the Reboot duration. This is an estimate of how long you will need to take administrative control of the machine. For more information about reboot duration, see “Important Terms When Adding or Removing Programs” immediately following this procedure.

Click **Next** to continue.

9. The Notification screen appears. To warn users that you will be taking administrative control of their machines and that a reboot is required, select I want to notify the users. This is recommended so that users can save any open work and so they will not be confused by what is happening during the administrative logon. Click **Next** to continue. If you selected to notify users, proceed to the next step. If you specified that you do not want to warn users, skip to step 11.
10. The Notification Settings screen appears. This is where you configure the message that will popup on users' machines before the administrative log on occurs. Indicate a Countdown length that will show the user how long until the log on occurs. If you want users to have the ability to refuse the install or uninstall by not allowing the administrative log on to take place, select the I want to permit the user to cancel the administrative log on checkbox. In the **Notification Message** box, enter the text that will appear in the

popup message. Click **Preview** to see how the popup message will look. For more information about administrative log ons and notifications, see “Important Terms When Adding or Removing Programs” immediately following this procedure.

Click **Next** to continue.

11. On the Specify Schedule screen, indicate the date and time you want to begin installing or uninstalling the program. You can also specify whether you want the install or uninstall to end at a certain time.

Specifying an end time does not mean the install or uninstall will go more slowly to fill the entire time frame you select. However, the install or uninstall will terminate at that time even if it has not completed for some reason. You can then view the Add or Remove Programs Report for details.

Click **Next** to continue.

12. Click **Finish** to close the Add or Remove Programs Wizard. After the install or uninstall, you can view the Add or Remove Programs Report to see detailed information about how many instances of the selected program were added or removed.

Important Terms When Adding or Removing Programs

Command Line Parameters

A command line parameter is necessary to provide *Sitekeeper* with information it needs to install or uninstall a program using the **PushInstaller**. *Sitekeeper* comes with default command line parameters for many programs. Also, you may have custom command line parameters you have written for other programs. If so, you can add your command line parameters and programs to the **Programs** list by clicking **Add programs**.

If you have a program you want to install or uninstall and it is not among the default programs included in the Programs box, and you have not yet created a command line parameter for it, you must do so before you can use the PushInstaller with it. To do so, click **Add Programs**.

On the Add or Edit Program screen, you can specify the name of the program and add the install or uninstall command line parameter for it. Each program may have different “switches” you must use to build a command line parameter -- in other words “/s” may mean different things for different programs.

If you are unsure about how to build an installation or uninstallation command line parameter for a particular program, see the documentation for it, or contact the manufacturer.

Additionally, when you specify the command line parameters, you must indicate whether the program requires a reboot for the install or uninstall to complete. Installs or uninstalls are silent unless a reboot is required.

Reboot Duration and Log On Permissions

If an installation or uninstallation requires that target machines must be rebooted, you must specify **User name** and **Password** information for any machines on which you do not have administrative permissions.

Without these permissions, the reboot cannot take place and the install or uninstall will not complete.

Specifying a reboot duration indicates the amount of time from the administrative log on to the administrative log off. During this time, the machine on which the install or uninstall is taking place is unavailable to the user. You can also specify that users be notified in advance when a reboot is required – all installations are done silently unless a reboot is required.

The default reboot duration is five minutes, but you may want to change this based on the processor speed of the machines on which you are installing or uninstalling, the size of the program being installed or uninstalled, and the speed of your network.

Administrative Log On and Notifications

You will probably want to schedule the **PushInstaller** for times when the least number of users will be using their workstations. Even if a user is logged in, PushInstalls that do not require a reboot are silent so a user can continue to work while the install or uninstall takes place. However, in the event that a user is logged into a workstation when an administrative log on must occur on a managed machine during an install or uninstall (when a reboot is required), you will probably want to warn users so they can save any open work and so they will not be confused by what is happening.

By selecting the **I want to notify the users** option on the Notification Settings screen of the Add or Remove Programs Wizard, you can give your users time to save and exit any work before the process begins.

You can customize the message that users see and specify a countdown to show how much time is left before the administrative log on will occur. Additionally, you can give the user the option of canceling the install or uninstall. When you select **the I want to permit the user to cancel the administrative log on** checkbox, a user can specify on the notification message screen that the log on not occur and the install or uninstall not take place.

Sitekeeper Reports

After you scan your managed machines, you can run a variety of *Sitekeeper* reports to determine inventory of programs installed on your managed machines, exact machines on which selected programs are installed, and program license compliance. Reports are available from the Manage Machines tab and include:

- Add or Remove Programs Report
- Scan Report
- Software Inventory Report by Program
- Software Inventory Report by Machine
- Hardware Inventory Report by Device

- Hardware Inventory Report by Machine
- Legacy Program Report
- License Report
- License Compliance Report
- Program Locations Report
- Device Locations Report

Add or Remove Programs Report

The Add or Remove Programs Report is available after you run the Add or Remove Programs Wizard. It provides detailed information including the action taken (install or uninstall), the name of the program that was installed or uninstalled, the date it was installed or uninstalled, and the number of machines on which it was installed or uninstalled.

From the report, you can select a task link on the right to open a report, or save, print, or export (as an HTML file) the current report. You can also view a Program Locations Report for the selected program.

Scan Report

A Scan Report appears after you scan selected managed machines or after a scheduled scan of all your managed machines. The Scan Report shows whether your scan was successful for all selected managed machines. If the scan was unsuccessful for any machines, detail information is provided.

From the report, you can select a task link on the right to open a report, or save, print, or export (as an HTML file) the current report.

Software Inventory Report by Program

The Software Inventory Report by Program displays a complete list of all programs installed on your selected managed machines by product. The

report displays the **Publisher**, **Program** name, **Version**, and date **Installed** for each program installed on each selected managed machine.

Not all software manufacturers provide **Publisher** information. If the information does not appear in the registry for this or any other reason, “Unavailable” appears as the entry in the **Publisher** column.

From the report, you can select a task link on the right to open a report, or save, print, or export (as an HTML file) the current report.

You can hide programs so they do not appear in reports, manage hidden programs, rename programs to customize how they appear in reports, and manage renamed programs.

Software Inventory Report by Machine

The Software Inventory Report by Machine displays a complete list of all programs installed on your selected managed machines. The report is sorted by machine and displays the **Publisher**, **Program** name, and **Version** for each program installed on each selected managed machine.

Not all software manufacturers provide **Publisher** information. If the information does not appear in the registry for this or any other reason, “Unavailable” appears as the entry in the **Publisher** column.

From the report, you can select a task link on the right to open a report, or save, print, or export (as an HTML file) the current report.

You can hide programs so they do not appear in reports, manage hidden programs, rename programs to customize how they appear in reports, and manage renamed programs.

Hardware Inventory Report by Device

The Hardware Inventory Report by Device displays a complete list of all hardware devices installed on selected managed machines. The report is sorted by device and displays the name of each **Device**, **Manufacturer**, and **Number** of each hardware device installed on your selected managed machines.

From the report, you can select a task link on the right to open a report, or save, print, or export (as an HTML file) the current report. You can also select a particular device and run a Device Locations Report.

Hardware Inventory Report by Machine

The Hardware Inventory Report by Machine displays a complete list of all hardware devices installed on selected managed machines. The report is sorted by machine and displays the **Domain** to which the machine belongs, **Machine name**, **Class** of device, **Manufacturer**, and **Description** of the hardware devices installed on each selected managed machine.

From the report, you can select a task link on the right to open a report, or save, print, or export (as an HTML file) the current report.

Hardware Device Key

The Device column in the following table lists items as they appear in the **Device** column of hardware inventory reports. The Comments column in the table lists the actual devices represented by the abbreviations and acronyms in the **Device** column of the reports.

Device	Comments
Battery	Battery device such as the battery in a notebook computer
Bios	BIOS (Basic Input/Output System)
CDROM	CDROM, CD/R, CD/RW, and DVD devices
DiskDrive	Disk Drive, can be removable or non-removable
Display	Display adapter
fdc	Floppy Disk Controller - controller for diskette drives
FloppyDisk	Floppy Disk; Diskette drives
hdc	Hard Disk Controllers. Usually IDE (Integrated Drive Electronics) class.

HIDClass	Human Interface Devices such as keyboard, mice and joysticks. Usually, but not always, USB.
Image	Imaging systems such as scanners
Keyboard	Keyboards
MEDIA	Sound, video, and game controllers
Memory	System RAM
Modem	Modems
Monitor	Monitors
Mouse	Mice and other pointing devices
Multifunction	Devices that fit into multiple categories or are multifunctional by design
Net	Network Interface Cards and devices
PCMCIA	PCMCIA (Personal Computer Memory Card International Association) controllers
Ports	Printer and COM ports
Printer	Printers
Processor	Central Processing Units (CPUs)
SCSI Adapter	SCSI (Small Computer System Interface) Adapters
TapeDrive	Tape Drives
USB	USB (Universal Serial Bus) Hubs and Controllers

Legacy Programs Report

The Legacy Programs report displays a complete list of all legacy programs installed on selected managed machines. The results of the reports are based on machines that have the *Sitekeeper* agent installed, and how you set up filtering for legacy programs.

From the report, you can select a task link on the right to open a report, or save, print, or export (as an HTML file) the current report.

License Report

The License Report shows licensing information for all programs installed on your managed machines. After you enter license information in the Add or Remove Program Licenses Wizard, you can generate a License Report to ensure you are in license compliance.

From the report, you can select a task link on the right to open a report, or save, print, or export (as an HTML file) the current report. You can also select a program and view a Program Locations Report listing each machine on which it is installed.

You can hide programs so they do not appear in reports, manage hidden programs, rename programs to customize how they appear in reports, and manage renamed programs.

License Compliance Report

After you scan machines, from the Scanning Complete screen you can access the License Compliance Report.

The License Compliance Report is a variation of the License Report that, using information you enter in the Add or Remove Program Licenses Wizard, shows detailed information on your license compliance. Any programs for which you are not in license compliance appear in the report so you can take corrective action, whether it be purchasing additional licenses or removing the program from workstations.

From the report, you can select a task link on the right to open a report, or save, print, or export (as an HTML file) the current report. You can also select a program and view a Program Location Report listing each machine on which it is installed. If you need to enter program licenses, click the **Add or Remove Program Licenses** task link on the Manage Machines tab.

You can hide programs so they do not appear in reports, manage hidden programs, rename programs to customize how they appear in reports, and manage renamed programs.

Program Locations Report

The Program Locations Report displays each instance of where a selected program is installed on your network. The report lists each machine on which the program is installed. You can use this report to verify results after you add or remove programs, or from a Software Inventory Report by Product or a License Report.

From the report, you can select a task link on the right to open a report, or save, print, or export (as an HTML file) the current report.

You can hide programs so they do not appear in reports, manage hidden programs, rename programs to customize how they appear in reports, and manage renamed programs.

Device Locations Report

From a Hardware Inventory by Device Report, you can select a device and run a Device Locations Report.

The Device Locations Report displays a complete list of each machine on which a selected device is installed. The Report displays the Domain or Workgroup to which the each machine belongs, and the Machine name.

From the report, you can select a task link on the right to open a report, or save, print, or export (as an HTML file) the current report.

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