Deployment Services Report

{Company Name}

Tuesday, March 31, 2009

Customer Service

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Deployment Services Report

1. Document Preparation

Prepared By	Jeff Kelsey
Date	1/29/2009
Document Name	DeploymentSummaryReport.doc

2. Customer Contacts

Name	Phone Number	Email Address	Title
John Smith	555-555-5555	jsmith@company.com	IT Analyst

3. Customer Environment

3.1. Product: Express Software Manager 9.0

3.2. Locations: The customer has five locations in Seattle, Spokane, Houston, Boston, and San Francisco. The central site where most IT functions reside is in Boston.

3.3. Number of Computers

Total Number of Sites:	5	
Total Number of Computers:	1250	
Site Name	Number of Computers	Network Bandwidth
Seattle	300	T3
Spokane	25	T1
Houston	25	T1
Boston	700	T3
San Francisco	200	T3

4. Installation of Express Components

4.1. Express Database – The Express Database was installed to a Windows 2003 Server\Instance named 2003Express\SQL located in Boston, Massachusetts, building 205, floor 3, Server room.

4.2. Express Access Point – The Express Database was installed to a Windows 2003 Server name 2003Express2 located in Boston, Massachusetts, building 205, floor 3, Server room.

4.3. Express Administrative Console and Express Server – The Express Administrative Console and Express Server were installed on John Smith's primary computer (John123) located in Boston, Massachusetts, building 203, floor 1, office 212.

4.4. Express Reports Website – The Express Reports Website was installed to a Windows 2003 Server name 2003Express2 located in Boston, Massachusetts, building 205, floor 3, Server room.

4.5. Client Discovery – The customer has Active Directory implemented and Express Discovery was used to discovery machines on the entire network.

4.6. Express Client Deployment – The Express Client was deployed to a total of 23 computers via the Express Administrative Console. The Express Client was deployed to 1 computer in Spokane, 2 computers in Houston, 10 computers in San Francisco and 10 computers in Boston. In addition, the client was installed to one Citrix Terminal Server (CTX2344) in Boston.

5. Configuration Management

5.1. Configured the Express Tasks – These were left at the default settings as follows:

Task	Schedule
Express Access Point Notification Task	Multiple schedule times
Express Auto-Identify Task	At 1:00 AM every day, starting 3/11/2008
Express Discover Task	At 1:00 AM every Sun of every week, starting 3/11/2008
Express Maintenance	At 2:00 AM every day, starting 3/11/2008
Express Reindex Task	At 1:00 AM every Sat of every week, starting 3/11/2008
Express Reset Task	At 1:00 AM on day 1 of every month, starting 3/11/2008

5.2. Upgraded the Express Software Identification Database (ESID) – The ESID was updated with the latest version which is January 2009.

5.3. Auto-Identified Exact Match files – After completing an inventory on 23 computers, Auto Identification was completed and produced 343 License Units.

5.4. Close Match Files – After Auto-Identification was completed there were 122 Close Match files. The majority of these file were attributed to 5 computers. We completed 5 ESID application scans for submittal to the ESID. It was decided at this time to Auto-Identify the close match files and this task was completed.

5.5. Unidentified Files – The customer was instructed how to search for these files and methods for properly identifying them. In addition, we did two more machine scans to collect information about several applications we were not identifying.

5.6. License Unit Configuration

    5.6.1.   Metering was enabled for 54 License Units
    5.6.2.   10 Custom Purchasing fields were created
    5.6.3.   Purchasing data was entered for several License Units.
    5.6.4.   The customer does not have any Concurrently Licensed Applications.
    5.6.5.   Control was demonstrated using a home grown application called "Timekeeper".

5.7. Other Assets – The customer did not want to use this feature

5.8. Client Configuration
    5.8.1.   Inventory Schedule – The schedule was modified to run once a week.
    5.8.2.   Custom WMI – We added the WMI custom attribute WIN32_QuickfixEngineering to collect the display name for Windows hot fixes.
    5.8.3.   User Defined Fields – The customer did not want to implement this feature at this time.

5.9. Configure Administrative Console User Policies
    5.9.1.   We configured User Polices to allow users from other locations to only access the License Unit Panel.

6. Report Configuration

6.1. Demonstration of Reports – The Express Reporting was demonstrated along with configuration of filters. In addition, Express Administrative Reports were also demonstrated.

7. Summary

The customer has five locations from which they desire to collect inventory and metering data. All five locations have adequate bandwidth to accomplish this task. During the Deployment Service we deployed the Express Server components in Boston and clients to each site. The customer will continue deployment of the client to the entire enterprise. In addition, the customer will deploy the Express Administrative Console and Express Server to each site for use by key IT personal in those locations. They will be restricted to configuration of License Units.

Component	Machine	OS Version	Location
Express Database	2003Express\SQL	2003 R2	Boston, BLD 205, 3rd Floor, Server Room
Express Access Point	2003Express2	2003 R2	Boston, BLD 205, 3rd Floor, Server Room
Express Server	John123	XP SP2	Boston, BLD 203, 1st floor, office 212
Express Admin Console	John123	XP SP2	Boston, BLD 203, 1st floor, office 212
Express Reports Website	2003Express2	2003 R2	Boston, BLD 205, 3rd Floor, Server Room

8. Check List of Delivered Services

(Note: Items not checked and highlighted in yellow were not delivered based on customer requirements).

8.1. Installation Services
- ☒ Install the Express Database to the SQL Server as specified by the customer.
- ☒ Install the Express Access Point to the IIS Server as specified by the customer.
- ☒ Install the Express Administrative Console and Express Server to a computer specified by the customer.
- ☒ Install the Express Reports Website to one computer specified by the customer.
- ☒ Discover Machines by Domain, AD, or DNS as requested by the customer.

- ☒ Deploy client to 25 machines using the deployment methodology identified by the customer. Note: If the customer is using third-party deployment methodologies, the customer will be responsible for configuration of the third-party deployment tool.

8.2. Configuration Management
- ☒ Configure the Express Scheduled Tasks
- ☒ Upgrade the Express Software Identification Database to the latest version.
- ☒ Identify and configure Files
  - ☒ Auto-Identify Exact Match files
  - ☒ Identify Close Match files and perform ESID Scan
  - ☒ Configure appropriate Close Match files
  - ☒ Evaluate other unidentified files and educate customer for dealing with these files.
- ☒ License Units
  - ☒ Work with customer to identify License Unit configuration strategy. Instruct customer on the following:
    - ☒ Configuring License Type
    - ☒ Configuring Metering where appropriate
    - ☐ Configuring Concurrent Licensing where appropriate
    - ☐ Configuring control for any application.
    - ☒ Entering or importing purchasing data.
    - ☒ Creating custom fields if required.
- ☐ Other Assets
  - ☐ Instruct customer on entering or importing "Other Assets"
- ☒ Customize Client
  - ☒ Inventory frequency
  - ☒ Additional file extensions
  - ☒ Additional WMI or User Defined Fields.
- ☒ Configure Administrative Console User Policies

Reporting
- ☒ Demonstrate commonly used reports
- ☒ Demonstrate creation of filters.

1.0 Customer Acceptance

The signature below acknowledges that Express Metrix has delivered the services as described in Deployment Services Scope of Work Document and summarized in this document.

Company: _____

Name: _____

Title: _____

Signature: _____

Date: _____

Please fax this signed page to 206-691-7901: Attention Express Metrix Services.