Peregrine

Desktop Inventory Installation and Upgrade Guide

For use with Desktop Inventory 7.0.0

PART NO: PDI-7.00-ENG-01005-00220

Peregrine SYSTEMS

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The names of companies and individuals used in the sample database and in examples in the manuals are fictitious and are intended to illustrate the use of the software. Any resemblance to actual companies or individuals, whether past or present, is purely coincidental.

If you have comments or suggestions about this documentation, please contact Peregrine Systems, Inc., Customer Support.

This edition applies to version 7.0.0 of the licensed program.

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About this guide

This installation guide explains how to install and configure the Desktop Inventory software.

Who uses this guide

This guide is written for anyone installing and/or configuring the Desktop Inventory software.

Knowledge requirements

You will need a basic knowledge of the environment in which you are working (Windows 95/98/2000/NT/XP).

Organization of this Guide

This guide is organized around the main functions associated with installation of the Desktop Inventory software. The following table shows you which part of the manual you need to reference to find the information you require.

To find this...	Look here...
System requirements	page 8
What Comes With Desktop Inventory?	page 9

To find this...	Look here...
Installing Desktop Inventory	page 12
Uninstalling Desktop Inventory	page 23
Information about upgrading from InfraTools Desktop Discovery 6.xx	page 26

Documentation available

Desktop Inventory documentation is available on CD-ROM in pdf format and on-line help.

Contacting Peregrine Systems

For technical support on this or any other product from Peregrine Systems, Inc., refer to the Customer Support Web site at:

http://support.peregrine.com

Installation and Upgrade Guide

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CHAPTER 1

Installing Desktop Inventory

Important: If you are upgrading from InfraTools Desktop Discovery (IDD) 6.xx, you must follow the *Upgrade procedures* on page 25. This chapter does not include any upgrade information.

What you will do in this chapter:

Inspect the system requirements for installing the software on your workstation (see *System requirements* on page 8)
Understand the Desktop Inventory components (see *What Comes With Desktop Inventory?* on page 9)
Run the Setup.exe file to set up Desktop Inventory (see *Installing Desktop Inventory* on page 12)
Licence the software (see *Licensing your software* on page 19)
If necessary, uninstall Desktop Inventory (see *Uninstalling Desktop Inventory* on page 23)

System requirements

To run Desktop Inventory we recommend that you have the following:

- Pentium III, 500 MHz, 256 MB memory
- A display resolution of at least 1024x768 with 256 colors
- Windows 2000, and 4 GB disk free

The system requirements are as follows:

Component	Disk space (approximate)
Analysis Workbench	8.50 MB
ApE Explorer	3.00 MB
ApE Server	3.50 MB
Common	17.5 MB
Connect-It Scenarios	364 KB
FSF Converter	1.90 MB
Licence Manager	725 KB
MySQL	54.5 MB
SAI Update Wizard	977 KB
Scanner Generator	49.0 MB
Scanner plug-in SDK	588 KB
Viewer	3.5 MB
XML Enricher Service	5.5 MB

What Comes With Desktop Inventory?

Inventory components

Component	Default installation location	Description
Analysis Workbench	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Analysis Workbench	The Analysis Workbench is one of the key components in the inventory process. This is where results are consolidated, analysis is performed and reports and exports are produced.
Application Encyclopedia Explorer	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\ApE Explorer	Application Encyclopedia (ApE) is a database-style recognition library which provides the application recognition technology foundation for Desktop Inventory.
ApE Server	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\ApE Server	The ApE Server is a software component that manages updates to the ApE database. It ensures that user customization is maintained and integrated with Desktop Inventory data from new SAIs.
Connectors	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Connectors	Contains a pre-defined Connect-It scenario for Desktop Inventory.
Documents	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Documents	Contains documentation about Desktop Inventory in pdf format.
FSF Converter	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\FSF Converter	The FSF converter is used to convert old InfraTools Desktop Discovery Fingerprint files (FSFs) to the Desktop Inventory version 7.0.0 **.xml.gz** format. The FSF converter accepts FSFs from InfraTools Desktop Discovery version 4.40 to version 6.03 (FSF version 4.32 to 6.00).
Licence Manager	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Licence Manager	Licence Manager is used to register the software and increase the number of licences for the software.

Component	Default installation location	Description
Scanner Generator	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Scanner Generator	The Scanner is configured and generated in Scanner Generator according to the specifications determined in the planning stage of the inventory.
Viewer	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Viewer	This tool allows you to view the detailed information contained within a scan file (.fsf or .xml.gz). This provides a convenient way of displaying software, hardware and asset information collected for an individual computer. The Viewer is aimed at technical support and help desk staff who need detailed configuration analysis and diagnostics.
XML Enricher	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\XML Enricher	The XML Enricher is a process that runs in the background and automatically adds application data to scan files. This process is called scan file enrichment.

Tools and Samples

Component	Default installation location	Description
Application Library (SAI)	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Common	The Software Application Index (SAI) enables the identification of files and applications installed across a computer population. This file is compiled by Peregrine Systems, Inc. in conjunction with numerous software vendors and quarterly updates are available to registered users in order to keep pace with software releases. Three kinds of SAI file are supplied: ■ Master.sai ■ French.sai ■ German.sai
Sample Scan Files	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Common\Samples	These are sample scan files (fsf or xml.gz), provided as examples for use in the Desktop Inventory applications.
Sample Analysis Workbench State Images	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Analysis Workbench\State Images	These are sample .aws files, provided as examples for use in Analysis Workbench.
Report Templates for Analysis Workbench	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Analysis Workbench\Reports	These are sample report templates .rtm files, provided as examples for use in Analysis Workbench.
SAI Update Wizard	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Utilities	This wizard must be used when upgrading from one Master SAI to another to ensure consistency of any user-edited SAIs.
Plug-in Software Development Kit	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\SDK	This Software Development Kit includes several files demonstrating how to write a plug-in using either MS Visual Studio (C source code) or Borland Delphi (Pascal source code).

Component	Default installation location	Description
Plug-ins	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Common\PlugIns	Contains two plug-ins for the Scanner Generator: ■ Extended Archive recognition ■ MS Office Data File recognition
Sample Scanners	C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Scanner Generator\Samples	These are sample Scanners, with preset options and limited scanning functionality.

Installing Desktop Inventory

This section describes how to install the Desktop Inventory software using the Setup program.

Before running the Setup program, ensure that:

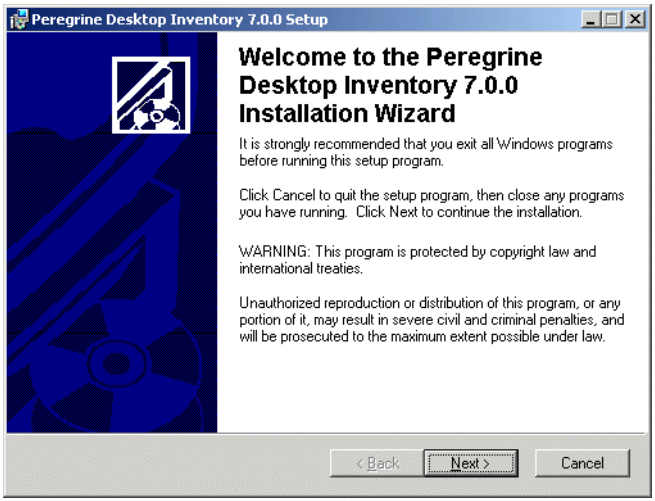
- A Windows 32-bit Operating System is installed on the computer
- No other Windows programs are running

To install Desktop Inventory

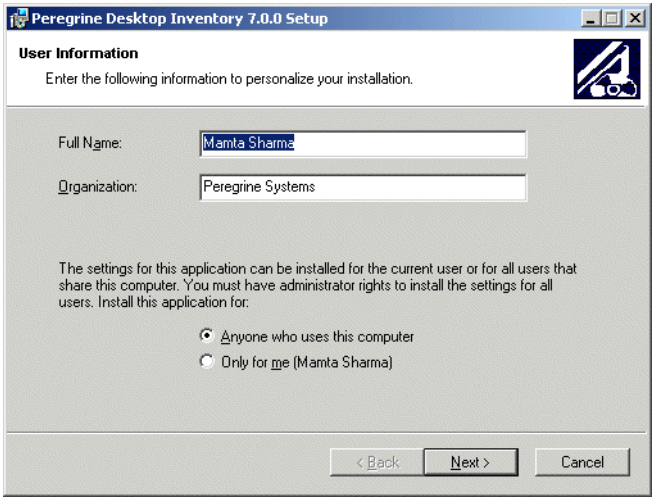
1 While Windows is running, insert the Installation CD into the CD ROM drive of your computer.

The CD is configured to auto-run, however if you need to start the Setup program manually, you can do this by navigating to the drive containing the CD and double clicking on the root **setup.exe** file.

The **Installation Wizard** appears.

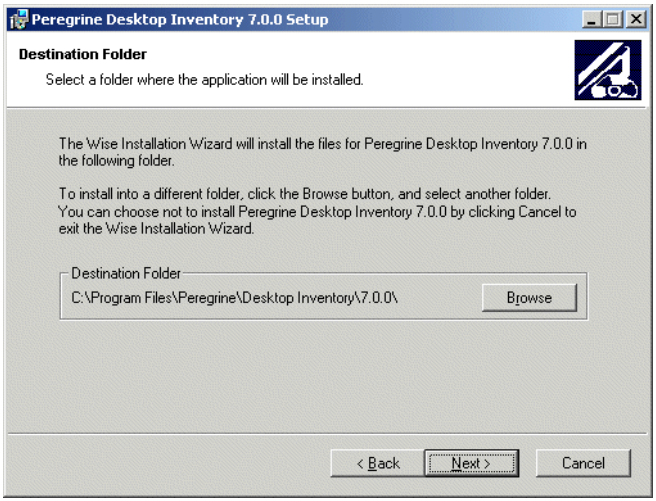


2 Click the **Next>** button. The **User information** screen appears.



3 Enter your name and company name.

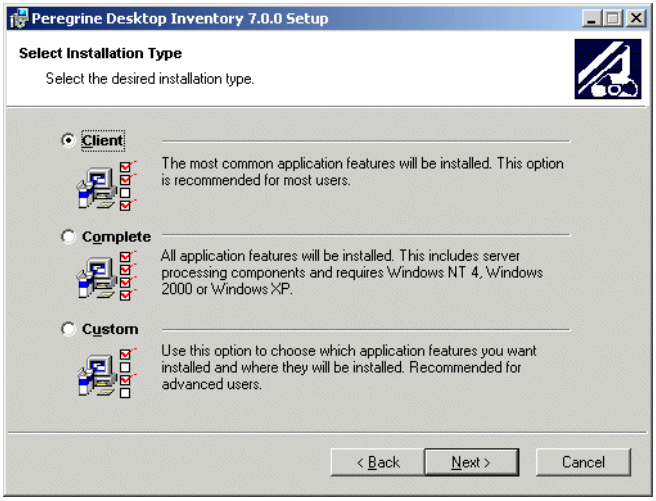
4 Click **Next>** to continue. The **Destination folder** screen is displayed



5 The default installation directory is **C:\Program Files\Peregrine\Desktop Inventory\7.0.0**. Click the **Browse...** button to change the destination folder.

Note: All components will be installed to this default location.

6 Click the **Next>** button. The **Select installation type** screen appears.



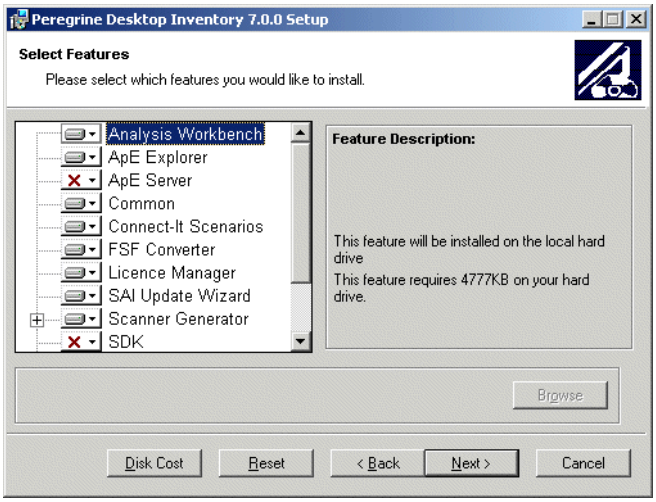
7 Select one of the following:

a. Client

b. Complete

c. Custom

8 If you select the **Custom** option, you will be presented with the **Select Features** screen.

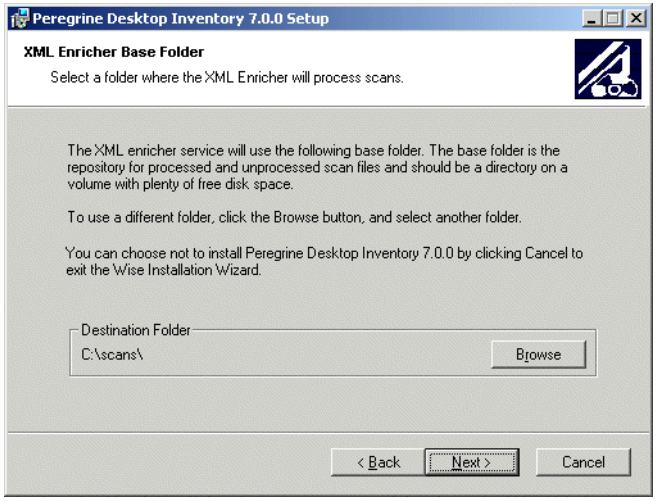


9 Click on the or icon next to the component you want to install or disable and select:

a **Will be installed on local hard drive** if you want to install the component, or

b **Entire feature will be unavailable**, if you do not want to install the component.

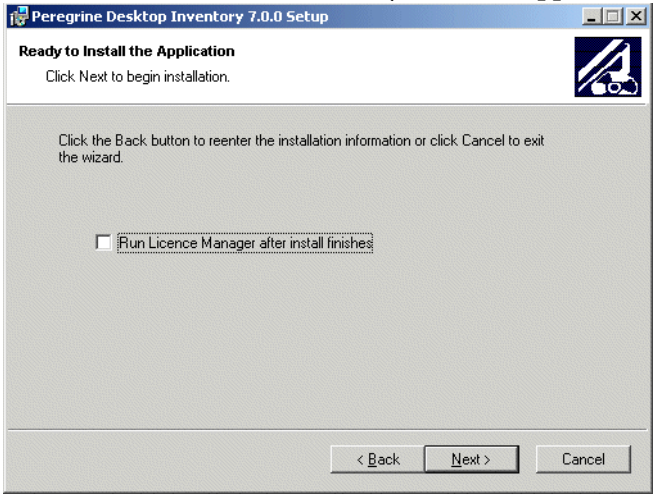
10 Click the **Next>** button to continue. The **XML Enricher Base Folder** screen is displayed if the XML Enricher was chosen for installation. It is part of the **Complete** setup but not the **Client** setup.



11 If you need to change the directory, do so, otherwise go with the default.

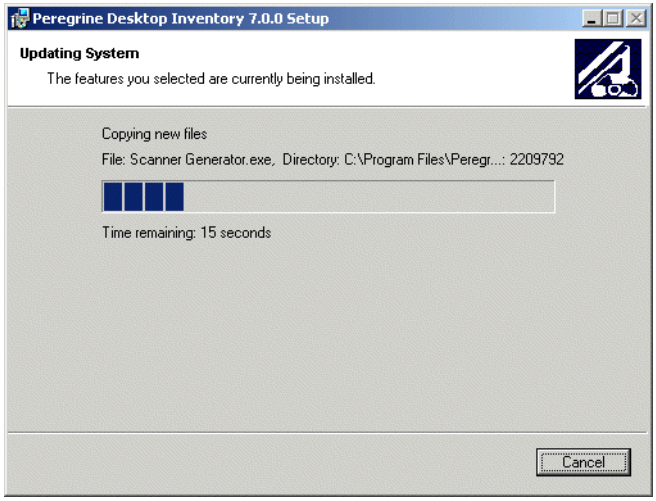
Important: The directory should point to a location with lots of disk space.

12 Click Next to continue. The **Ready to Install Application** screen is displayed.

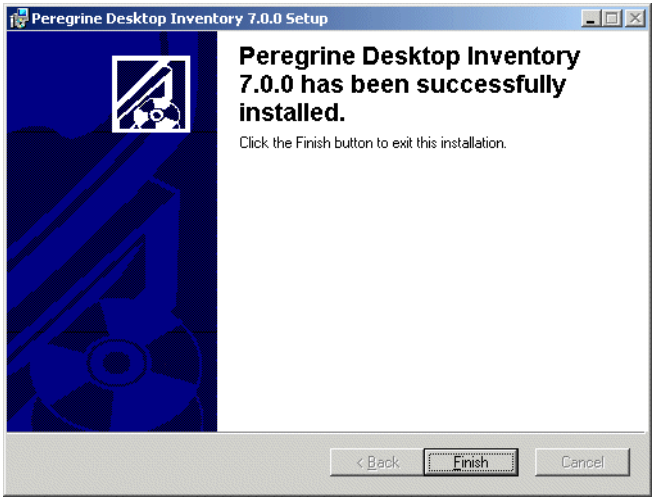


If this is your first time installing the software, click the **Run Licence Manager after install finishes** option. You can find information about licensing on page 19 of this guide.

13 Click the **Next>** button to begin the installation. A progress indicator is displayed:

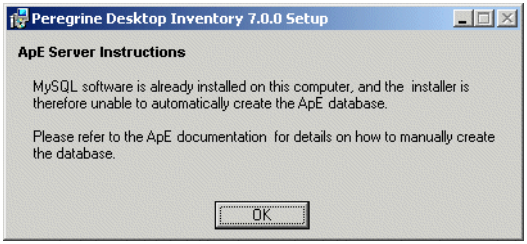


14 Once the installation is complete, the following screen is displayed.



15 Click the **Finish** button.

If you already had MYSQL installed on your machine, the following message will be displayed:



16 Click **OK** and refer to the section entitled 'Manually creating the ApE Database' in the Application Encyclopedia User's Guide. This document is available in two locations:

- C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Documents
- By selecting the **Application Encyclopedia User's Guide** entry in the **Peregrine|Desktop Inventory 7.0.0|Documents** sub menu of the **Start** menu.

Note: You may be asked to restart you computer after installation.

17 The installation of Desktop Inventory is complete.

Licensing your software

After installing the Desktop Inventory 7.0.0 software, you have a five user evaluation licences. Where the basic five user evaluation licence system is required, there is no further action to be taken. If however, more than five licences are wanted, then the Licence Manager program must be run.

Licence Manager provides the following options for licensing your software.

- If you are not an existing user of the Desktop Inventory software and are installing the software for the first time, the **Register** option allows you to enter your organization details and licence serial number to personalize and license your copy of the software.
- The **Upgrade** option allows you to increase the number of machines your Desktop Inventory software is licensed for.
- The **View** option allows you to view your current licence status.

Starting Licence Manager

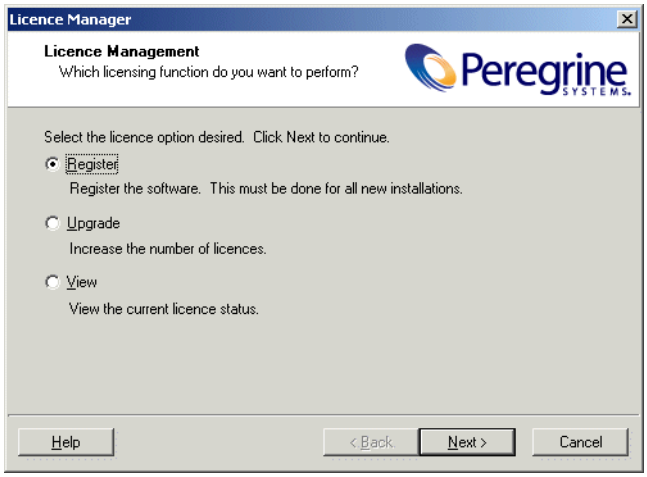
The Licence Manager is automatically launched at the end of the Desktop Inventory installation process, if you selected the **Run Licence Manager after install finishes** option in the Installation Wizard. To start Licence Manager manually at any other time:

1 Select the **Licence Manager** entry in the **Programs|Desktop Inventory 7.0.0** submenu of the **Start** menu.

The **Welcome** screen is displayed.

2 Click the **Next** button to continue.

The **Licence Management** page is displayed.

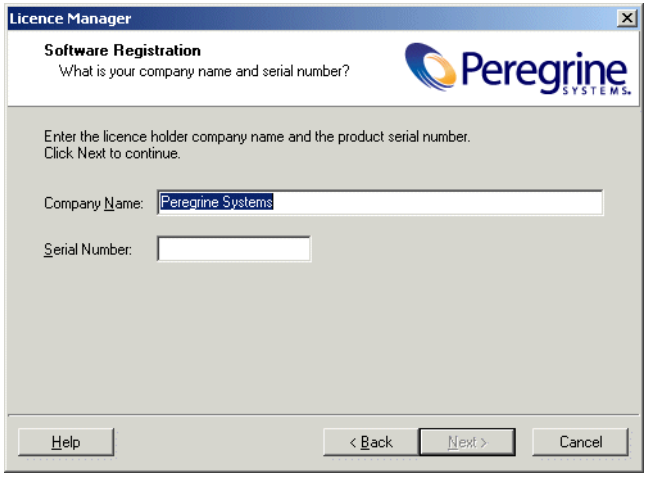


Installing new licences

To license your Desktop Inventory software

1 In the **Licence Management** page, select the **Register** option.

2 Click the **Next** button. The **Software Registration** page is displayed.



3 In the **Software Registration** screen enter the name of your organization in the **Company Name** field.

4 Enter the serial number (obtained by contacting your local Peregrine Systems support team after receiving the product) in the **Serial Number** field.

5 Click the **Next** button (it becomes enabled when the serial number has been correctly entered).

The software registers the new licence.

Increasing licences

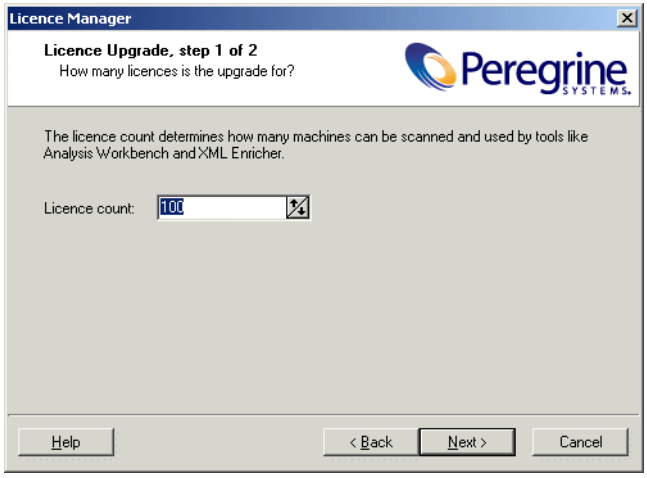
All copies of the Desktop Inventory software are shipped installed and initially licensed for use on five machines only.

Desktop Inventory provides facilities to increase the number of machines licensed to be inventoried. Usually this would be performed during the initial installation, or at any time using the facilities provided by the Licence Manager program.

On receipt of a valid purchase order, the number of machine licences can be increased as follows:

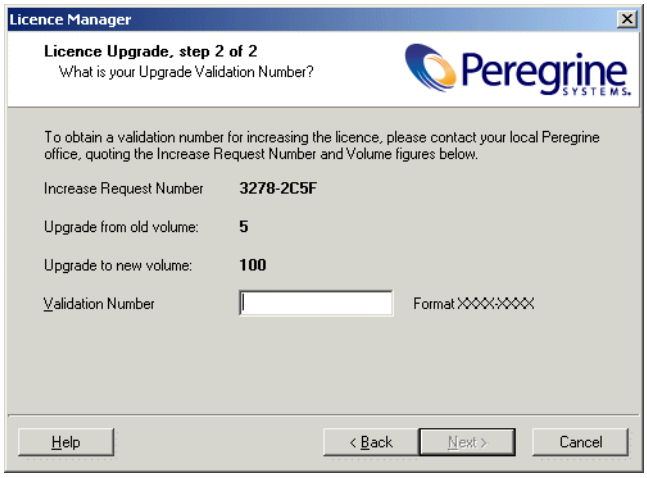
1 In the **Licence Management** page, select the **Upgrade** option.

2 Click the **Next** button. The first page of the **Licence Upgrade** procedure is displayed.



3 Enter the total number of machines for which licences are required (including the current licensed quantity) in the **Licence count** field.

4 Click the **Next** button to continue. The second page of the **Licence Upgrade** procedure is displayed.



5 Telephone Peregrine Systems, Inc. Customer Support, and ask to increase machine licences, quoting the **Increase Request Number** and **Volume** figures (displayed in the dialog box). A validation number will be given either verbally or by Fax.

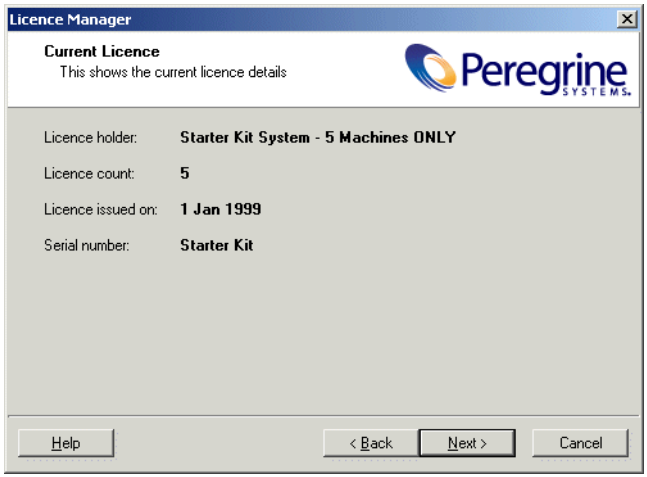
6 Enter this number carefully in the **Validation Number** field (note: the validation number is case sensitive and all alphabetical characters must be entered in upper case) and click the **Next** button. The **Licence Manager** program automatically increases the number of computers licensed to be inventoried.

Viewing your licence status

To view your current licence status:

1 In the **Licence Management** page, select the **View** option.

2 Click the **Next** button. The **Current Licence** page is displayed.



Uninstalling Desktop Inventory

This section explains how you uninstall the Desktop Inventory components.

Removing InfraTools Desktop Inventory components

To remove Desktop Inventory components installed on your system:

1 In **Control Panel|Add/Remove Programs**, select the **Peregrine Desktop Inventory 7.0.0** entry.

2 Click **Add/Remove…** . Follow the on screen instructions.

3 At the end of the uninstallation process, you will be asked to restart your computer.

Files remaining after the uninstallation has completed

Some files remain after Desktop Inventory has been uninstalled. To completely remove all Desktop Inventory files, you will need to manually delete these files from your computer.

Warning: Be sure to keep any files you intend to use with your new software installation. For example, user.sai files, saved report templates (.rtm), exports from Analysis Workbench, state images etc.

CHAPTER 2 Upgrade procedures

Customers who have used InfraTools Desktop Discovery 6.xx will need to follow these procedures to upgrade to the new Desktop Inventory 7.0.0 software.

In this chapter you will find information on the following topics:

- *Information about upgrading from InfraTools Desktop Discovery 6.xx* on page 26
- *Migrating your old ApE database* on page 27
- *Converting your FSF files* on page 30
- *Using the SAI Update Wizard so you can use your old User SAIs with the new software* on page 36

Information about upgrading from InfraTools Desktop Discovery 6.xx

If you are upgrading your software from InfraTools Desktop Discovery 6.xx to Desktop Inventory 7.0.0 you must complete these procedures before uninstalling the old software.

Important!

Before carrying out the upgrade procedures, please read the following:

- If you have a previous version of InfraTools Desktop Discovery installed on your computer, **do not** uninstall it before installing Desktop Inventory 7.0.0. Failure to do so may result in lost data.
- We assume that you have a good working knowledge of the InfraTools Desktop Discovery software you are upgrading from.
- In this section the following convention has been used to indicate the versions of your software:
  - InfraTools Desktop Discovery (IDD) 6.xx - old software
  - Desktop Inventory 7.0.0 - new software.

Migrating your old ApE database

Carry out this procedure if you want to migrate the data in your old Application Encyclopedia (ApE) database to the new ApE database in Desktop Inventory 7.0.0.

Before carrying out this procedure, ensure that:

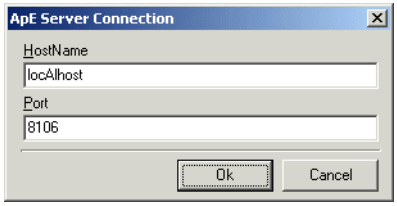
- You have not removed the old software from your machine.
- Your new ApE database is empty - that is, you have not already imported a **master.sai** into it.

To migrate your old ApE database:

1 From your InfraTools Desktop Discovery 6.xx software, export the contents of the database to a read-only SAI file. Information on how to do this can be found in the document supplied with your IDD software entitled 'Application Encyclopedia Technical Reference'.

This exported SAI will be a read-only file that you will import into the new Desktop Inventory 7.0.0 software.

2 Start the new ApE explorer. Select the **Application Encyclopedia Explorer** entry in the **Desktop Inventory 7.0.0** sub menu of the **Start** menu. After a few seconds the Ape Explorer login dialog is displayed.



3 Enter the **Hostname** and **Port** for the Ape Server. You can use the default settings when the ApE Server is installed on the local machine. The default settings are:

a Hostname - LocalHost

b Port - 8106

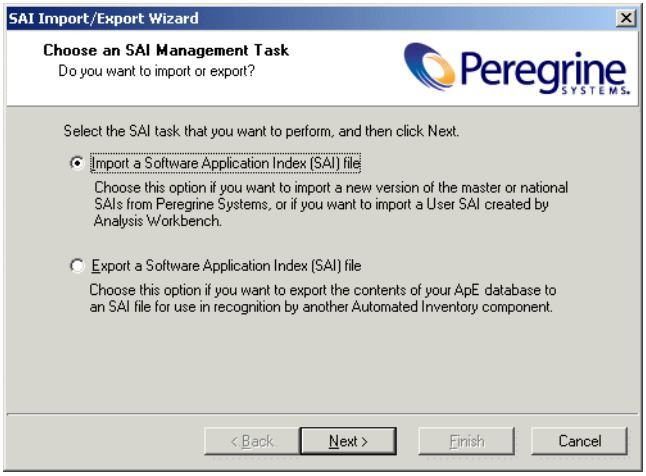
Double check that you have entered the correct details. A failed connection is usually due to incorrect information being entered here.

Note: The Hostname is not case sensitive.

4 Click **OK** to log in to ApE Explorer.

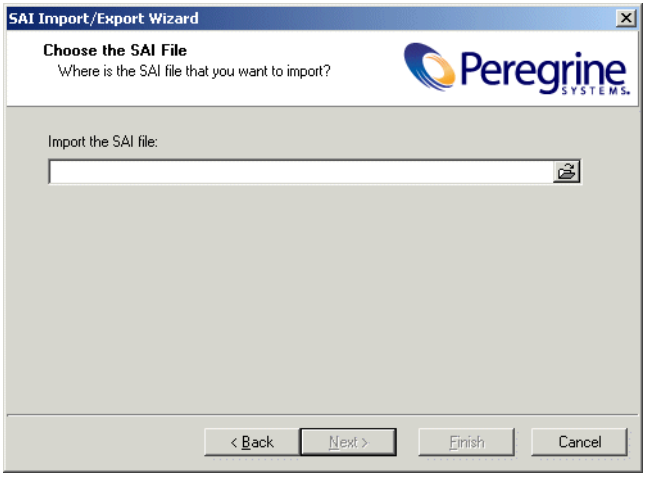
Note: The next step will only work if the database is empty.

5 Import the SAI file created in Step 1. The new ApE Server will convert the data and place it into the ApE database. Click the toolbar button or select the **Import/Export SAI** option from the **Tools** menu. The **SAI Import/Export Wizard** is displayed:



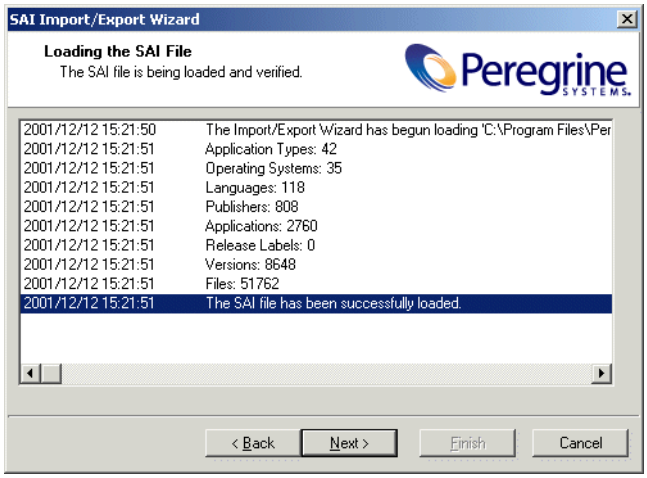
6 Select the **Import a Software Application Index (SAI) file** option.

7 Click **Next** to continue. The second page of the wizard appears.



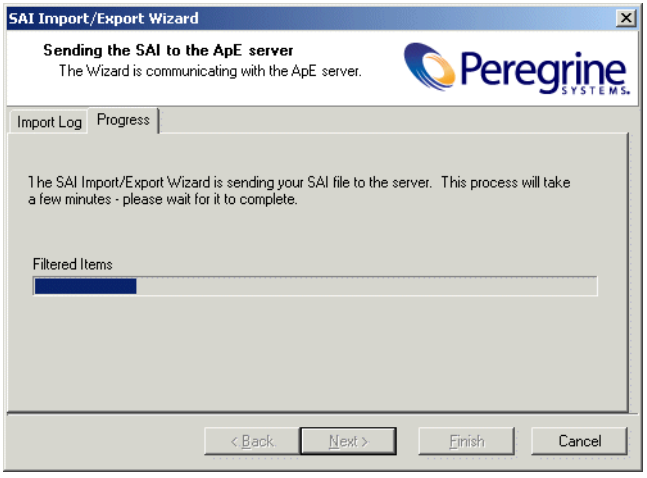
8 Navigate to the SAI file the data is to be imported from. This is the file you exported from you old database in step 1.

9 Click **Next** to continue. The third page of the Wizard appears.



This page shows the SAI being loaded and verified. It shows the numbers of application types, operating systems, languages, publishers, applications, release labels, versions and files that were loaded from the SAI.

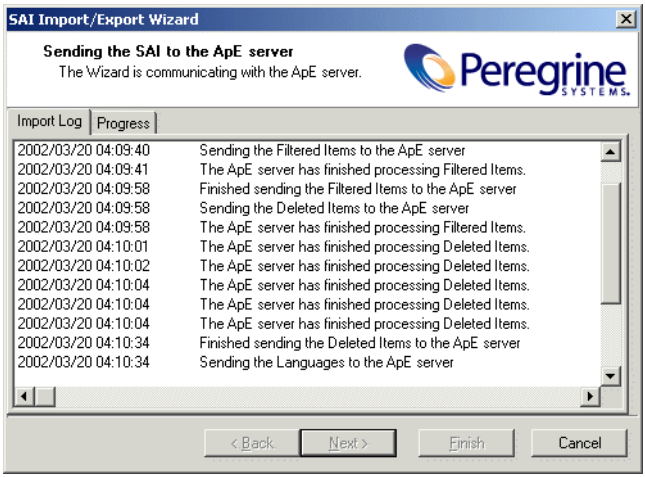
10 Once it have finished this process, click the **Next** button to continue. The fourth page of the Wizard appears.



This page shows the progress of the actual import. The contents of the SAI file are sent to the ApE Server.

11 Once the import process is complete, you can view a log of the events that took place by clicking the **Import Log** tab.

Note: The log is also available during the import procedure.



12 Click the **Finish** button. The import is now complete and the results can be seen in the ApE Explorer workspace.

13 Now, import the new **master.sai** supplied with Desktop Inventory 7.0.0 by following the same procedure from steps 7 to 14 and importing the **master.sai** file instead of the read-only SAI.

Converting your FSF files

Use the FSF converter to convert old InfraTools Desktop Discovery Fingerprint files (FSFs) to the Desktop Inventory version 7.0.0 **.xml.gz** format.

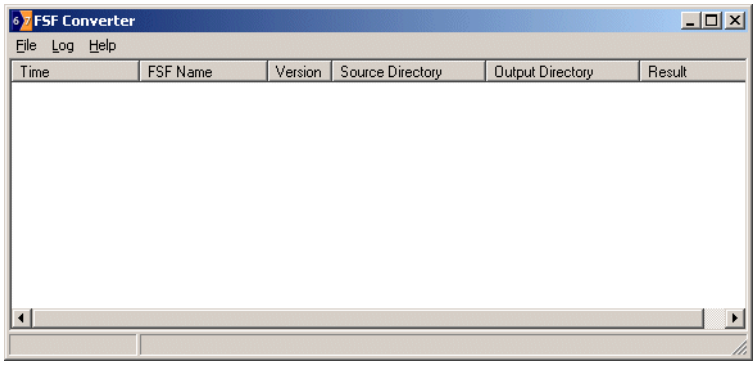
Important!

Before converting your FSF files, read the following:

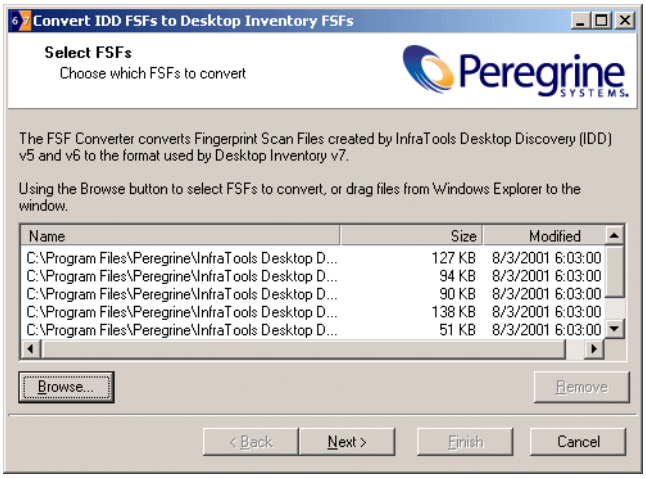
- The FSF converter accepts FSFs from InfraTools Desktop Discovery version 4.40 to version 6.03 (FSF version 4.32 to 6.00).
- In order to achieve the best quality of data we recommend that you re-scan you computer population instead of converting all your existing fingerprint files. The Desktop Inventory Scanners collect a wealth of information not collected by the InfraTools Desktop Discovery Scanners.
- Scan files created with Desktop Inventory software cannot be read by InfraTools Desktop Discovery software. That is, there is no backwards compatibility.

To convert old FSFs to the Desktop Inventory version 7.0.0 .xml.gz format:

1 Select the **FSF Converter** entry in the **Programs|Peregrine|Desktop Inventory 7.0.0** submenu of the **Start** menu. The FSF Converter main window appears.



2 Select the **Convert FSF...** option from the **File** menu. The **Conversion Wizard** appears.



3 Choose which FSFs to convert. This can be done with the **Browse** button or by dragging the files from the Windows Explorer to the wizard.

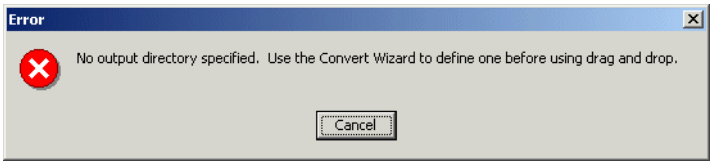
4 You can remove currently selected (highlighted) items from the list by:

   a Clicking the **Remove** button.

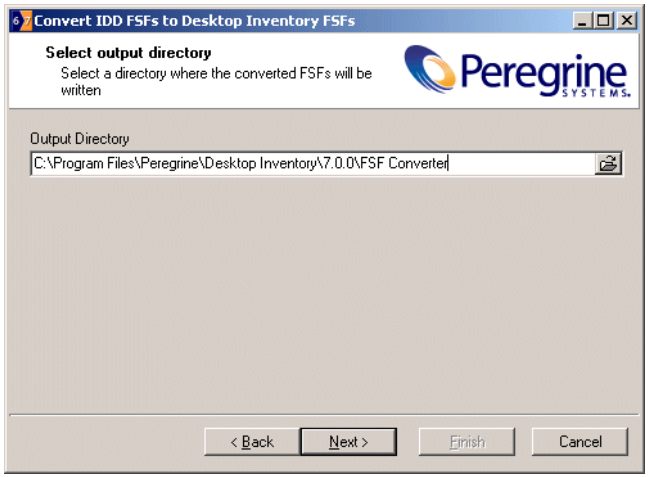
   b Pressing the **DEL** key when the list has focus.

5 The **Next** button is enabled when at least one file is in the list. Click **Next** to continue.

Note: Once the wizard has been used once, the conversion process can be started by dropping files on the main window without using the wizard. In this case, the settings from the previous run will be used. If the wizard has never before been used, an error message is displayed.



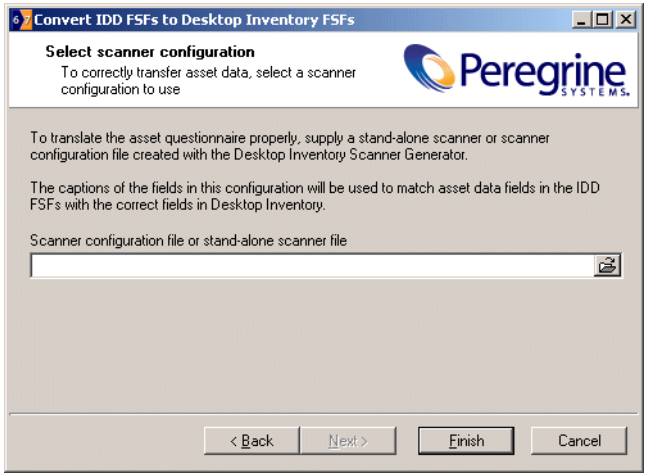
6 The second page of the wizard is used to choose the output directory for the converted files.



Note: The directory must already exist.

7 The **Next** button is enabled when this field is not blank. Click **Next** to continue.

8 On the last page, choose a Scanner configuration to use for converting asset data.

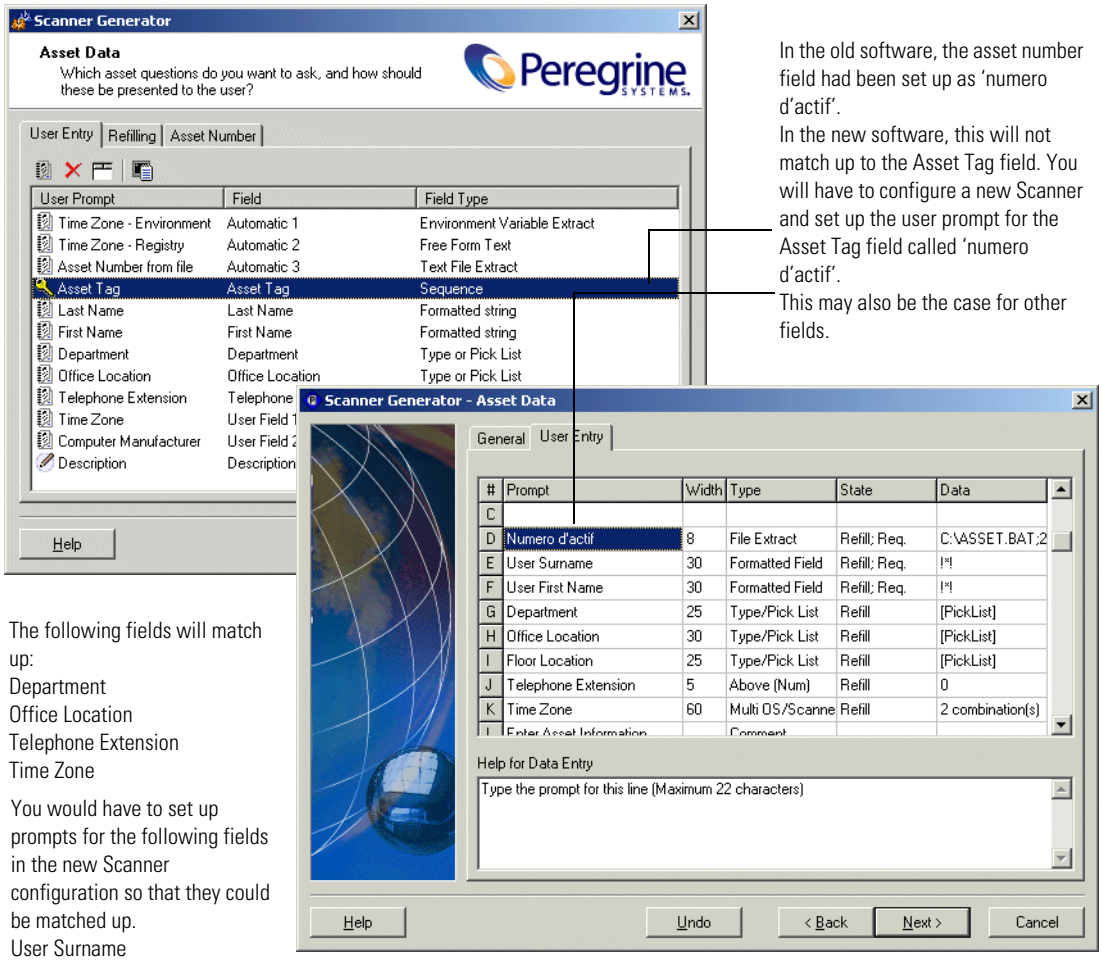


This step is optional and the wizard allows the **Finish** button to be clicked if the entry field is blank or contains the filename of a valid Desktop Inventory version 7.0.0 Scanner or Scanner configuration file.

The reason for doing this is the lack of compatibility between the asset questionnaires for InfraTools Desktop Discovery and Desktop Inventory 7.0.0.

You will have to configure a new Scanner using Desktop Inventory 7.0.0 so that the captions can be matched up with those that were used in the Desktop Discovery scans.

For example, in the following screen shot, the field called 'Numero d'actif' has been set up as the asset number field in the old questionnaire. To ensure that data from this field is stored in the asset number field in Desktop Inventory 7.0.0, configure a new Scanner and set up a user prompt for the asset field as 'Numero d'actif' so that the two can be consolidated.



In the old software, the asset number field had been set up as 'numero d'actif'.
In the new software, this will not match up to the Asset Tag field. You will have to configure a new Scanner and set up the user prompt for the Asset Tag field called 'numero d'actif'.
This may also be the case for other fields.

The following fields will match up:
Department
Office Location
Telephone Extension
Time Zone

You would have to set up prompts for the following fields in the new Scanner configuration so that they could be matched up.
User Surname
User First Name

This must be done for all fields that were customized in the Desktop Discovery software and deviated from the standard questionnaire supplied. In the example the following fields would automatically be consolidated without you having to do anything:

- Department
- Office Location

- Telephone Extension
- Time Zone

You would have to set up prompts for the following fields in the new Scanner configuration so that they could be matched up.

- User Surname
- User First Name

9 Once you have configured a new Scanner which reflects the asset fields correctly, use the Scanner in this page of the wizard.

10 When the **Finish** button is pressed, the selected files are converted.

Verify the results

To verify the result of the conversion, load a converted **xml.gz** scan file into the Desktop Inventory Viewer and navigate to the **Hardware and Configuration** tab. Click on the **Asset Data** folder and inspect the data to verify that the desired asset data fields were converted correctly.

Using the SAI Update Wizard so you can use your old User SAIs with the new software

The Software Application Index Update Wizard is a utility that allows new master and national application libraries to be installed without compromising the integrity of existing custom library extensions, commonly referred to as User SAIs.

It reads **Existing Master SAI(s)** and a **Customized User SAI** and tries to match the information in these two files with **New Master SAI(s)**.

Note: There can be multiple Existing SAI files; one Master and a national SAI is a normal case, although it is possible for there to be multiple national SAI files. For example, French, German and Italian.

Any entries encountered, that cannot be resolved (for example, a new Version in the Customized User SAI referencing an application entry that does not exist in the New Master SAI(s)) are flagged.

Flagged entries are then matched against the Existing Master SAI(s), and those entries that are found, are 'adopted' into the Customized User SAI so the information obtained from recognition is the same.

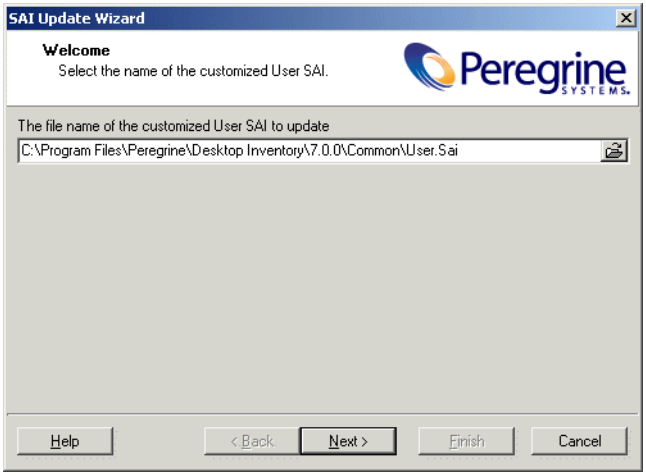
If an entry is not found in the Existing Master SAI(s) either (i.e. the upgrade is not really valid), the entry without a match is flagged for deletion from the Customized User SAI.

Note: No changes are made to the data, until after the **Summary** screen.

To use the SAI Update Wizard:

1 Select the **SAI Update Wizard** entry in the **Programs|Peregrine|Desktop Inventory 7.0.0** submenu of the **Start** menu. The **SAI update wizard** is displayed.

2 Click **Next** to continue.



3 Enter the following information:

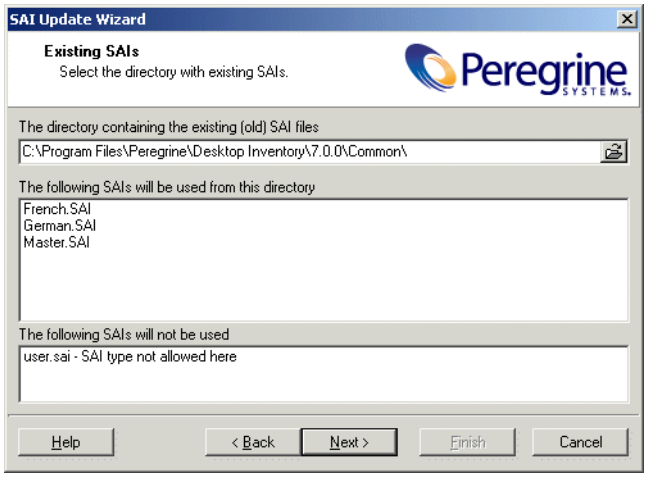
- Latest customized User SAI: Entered in the **File name of customized User SAI** field. The Customized User SAI specified here must be the one that is working with the Existing Master SAI(s).

Note: There can be multiple Existing SAI files. One Master and a national SAI is a normal case, although it is possible for there to be multiple national SAI files (for example, French, German and Italian). From this point onwards Existing Master and national SAI files are collectively referred to as Existing Master SAI(s).

The Customized User SAI will be upgraded by the utility to work with the New Master SAI(s).

4 Click the **Next** button to continue.

5 Page 2 of the wizard is displayed.

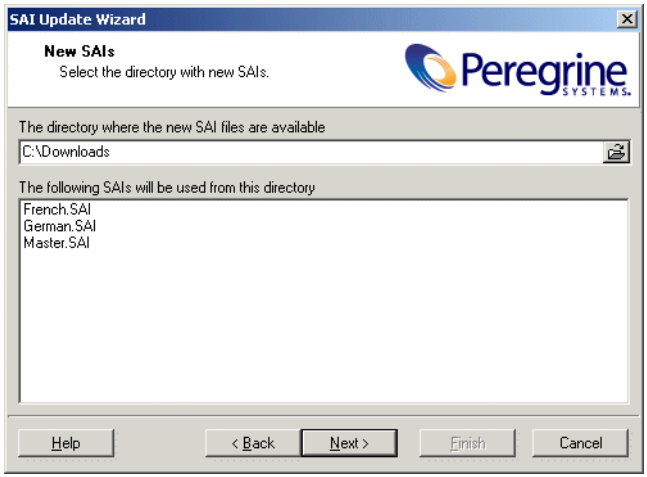


6 Select the directory that contains your Existing Master SAI files. By default this directory is

C:\Program Files\Peregrine\Desktop Inventory\7.0.0\Common\

Any SAI files that are used in this directory are shown. It also displays SAI files that it doesn't use (if there are any).

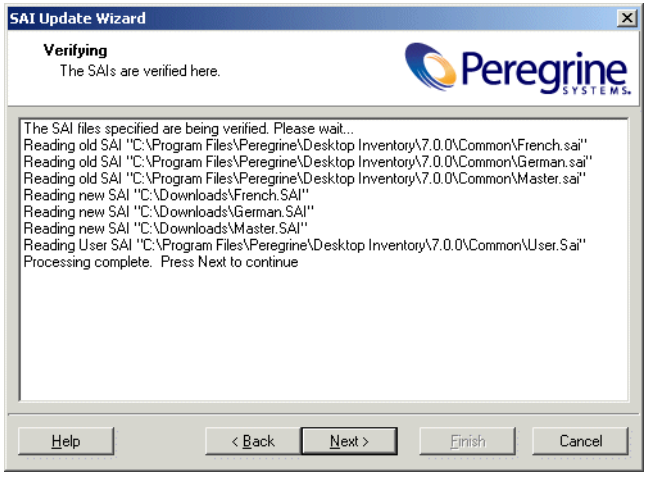
7 Click the **Next** button to continue. Page 3 of the wizard is displayed.



8 Select the directory that contains your New Master SAI file(s).

Any SAI files in this directory are shown.

9 Click the **Next** button to continue. Page 4 of the wizard is displayed.



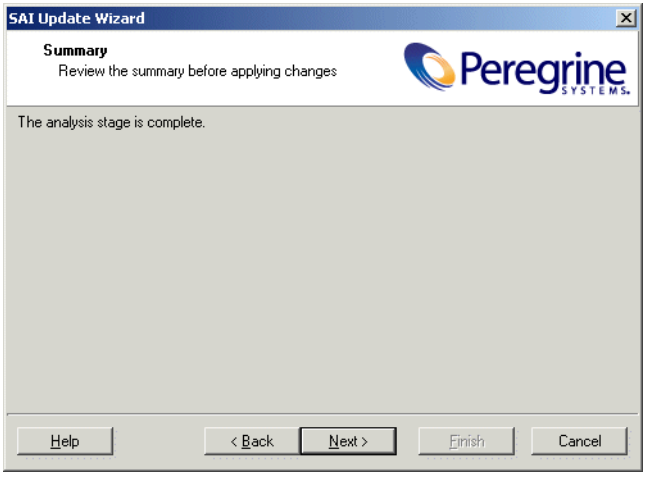
The Existing Master SAI(s), New Master SAI(s) and the Customized User SAI are read. The information contained in New Master SAI(s) is compared to match the information contained in the Existing Master SAI(s) and Customized User SAI.

Any entries encountered, that cannot be resolved (for example, a new Version in the Customized User SAI referencing an application entry that does not exist in the New Master SAI(s)) are flagged.

Flagged entries are then matched against the Existing Master SAI(s), and those entries that are found, are 'adopted' into the Customized User SAI so the information obtained from recognition is the same.

If an entry is not found in the Existing Master SAI(s) either (i.e. the upgrade is not really valid), the entry without a match is flagged for deletion from the Customized User SAI.

10 Click the **Next** button to view the results. A summary page is displayed.



This screen shows a summary of the results when the information in the New Master SAI(s) was compared with the Existing Master SAI(s) and Customized User SAI.

If the analysis was completed successfully, a message is displayed indicating that no changes need to be made and the Application Library is in a consistent state.

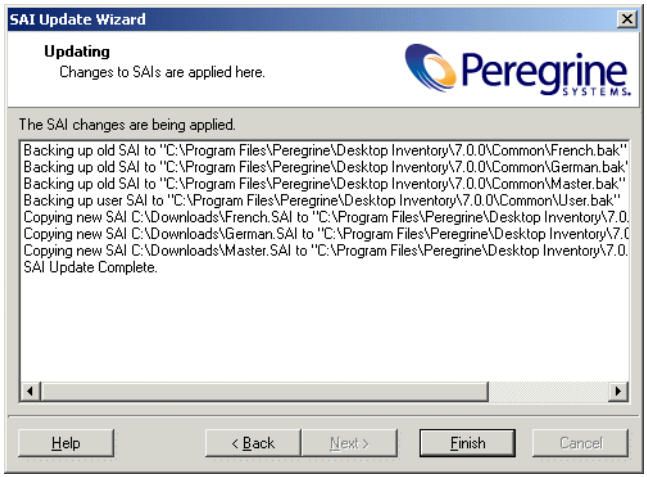
If anomalies are found, then up to two outline views are shown:

- Entries to be adopted from the Existing Master SAI(s) into the Customized User SAI, by category (publisher, application, version) and
- Entries to be deleted from the Customized User SAI, by category

11 Click the **Next** button to continue.

Warning: At this stage, changes are made to the data. The following is carried out:
The Customized User SAI is modified
The Existing Master SAI(s) are renamed to .BAK
The New Master SAI(s) are copied to replace the old one(s).

12 Click the **Next** button to continue. The next page of the wizard is displayed.



This screen shows the progress of any updates that are made.

- The Customized User SAI is modified.
- The Existing Master SAI(s) is renamed to .BAK.
- The New Master SAI(s) is copied to replace the old one.

13 Click the **Finish** button. The SAI update procedure is completed.