





# Matrix42- Software Asset Management – SAM

Self Service Portal UUX – Unified User Experience

**September 2020, version 1.0**

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## SAM - Introduction

### What is SAM?

SAM (Software and Asset Management) is an application used to manage software (services that can be ordered) and hardware. The University of Vienna uses SAM to gain an overview of the software that is being used. Every software is usually allocated to a uniquely identifiable client (asset).

### Where does the ZID's support begin and/or end?

The ZID provides software on the basis of licence agreements concluded with the relevant software manufacturers. This software can be ordered via SAM and installed according to the conditions (technical requirements) specified by the manufacturer. The ZID does not provide support regarding the functionality of the software. This is the responsibility of the relevant manufacturer.

### Supported operating systems

Software is offered in different versions (supported operating system, processor architecture). Note the prefixes *m:*, *m: \** and *u:* (see explanations below), the information about the operating system and additional information when selecting software. In general, the following operating systems are supported:

- Windows 10
- macOS
- Linux

### The self-service portal

The self-service portal contains all information about your person and assets. Any active employee of the University of Vienna (having a pkey – personnel number) can order software via the self-service portal. The portal offers a range of functions, including:

- overview of your current activities (orders, approvals)
- overview of your
  - o orders
  - o services
  - o hardware
- managing software orders.

### Advanced features

In addition, the portal offers the following advanced features to users:

- ReportViewer: The *ReportViewer* feature allows basic users, who are not IT representatives or cost centre managers, to view different reports such as quarterly invoices or bookings. If necessary, ask your IT representative to enable this feature for you.
- KST feature: Cost centre managers are in charge of approving or rejecting orders. They receive an e-mail about any pending decisions.
- IT representative: In addition to the self-service portal, IT representatives can use two other applications (service catalogue and assets) to manage assets and persons in SAM.

### Managed/unmanaged clients

Software from the software portfolio of the ZID is offered as part of a rental model at the University of Vienna. It is available in SAM as a *service* that can be ordered. This means that software can be rented on a quarterly basis. The costs are charged at the end of the rental term. You can either place the order yourself in the self-service portal or ask your IT representative to place the order using the

management console. You can check the order progress in the self-service portal under *Workplace/My Orders* or under *Home*.

When ordering software, it is important to distinguish between *managed* and *unmanaged client*. For managed clients, you may only order services labelled with *m*: (managed software). For unmanaged clients, you may only order services labelled with *u*: (unmanaged software). Software labelled with *m: \** is special. This type of software is not intended for automatic distribution. It has to be installed manually, even though it is intended for managed clients.

- *m*: software: for managed clients => automated installation via Empirum
- *m: \** software: for managed clients => manual installation
- *u*: software: for unmanaged clients => manual installation

**Please note:** The ZID distinguishes between *managed* and *unmanaged clients*. Managed clients are provided via the software distribution system Empirum (managed instance) of Matrix42. They are prepared by the IT representative and can be automatically equipped with an operating system and additional software. Any other *managed software* that you order (with the exception of software labelled with *m: \**) is also installed on your client by default. *Unmanaged clients* are managed by the user and/or the IT representative. This means that you or your IT representative have to manually install and/or uninstall any *unmanaged software* you order on your client.

If you are not sure whether you are using a *managed* or *unmanaged client*, the following tips might be helpful:

- After turning on your client, do you log in to the *U* domain (*Log on to: U*) using your *u*:account? Yes => *managed client*
- Does the software distribution system Empirum occasionally appear on the log-in screen? Yes => *managed client*
- Experienced users can search for the environment variable *EmpirumServer*. Type "msinfo" in the search bar of the Windows Home field and search for the variable under *Software Environment*. Is the variable available? Yes => managed client
- Are you using an Apple device? Yes => unmanaged client

If you are still unsure, please contact your IT representative.

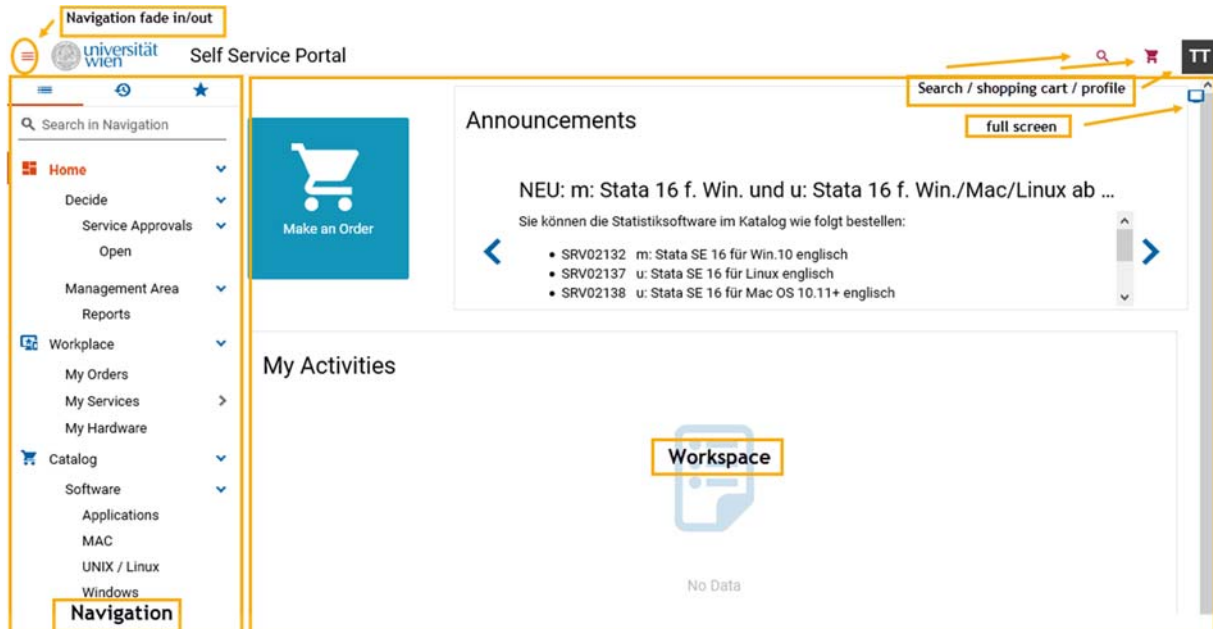
### How is a client entered into the SAM application?

- Managed Empirum: Managed Empirum clients are created and installed using the Empirum console. They are then imported into SAM when Empirum next connects to it. You can then order software for fully inventoried devices. Supported operating systems: Windows 10, Linux Ubuntu
- Unmanaged Empirum: Unmanaged Empirum clients are installed and configured by the user or the IT representative and are inventoried via TIT/SAM (see last chapter). They are then also imported into SAM when Empirum next connects to it. Supported operating systems: Windows 10, macOS
- Unmanaged manual: Unmanaged clients with the management type *manual* are basically equivalent to unmanaged Empirum clients. However, you have to enter them into SAM manually. The application does not create an inventory for this device.

## SAM UUX – the interface

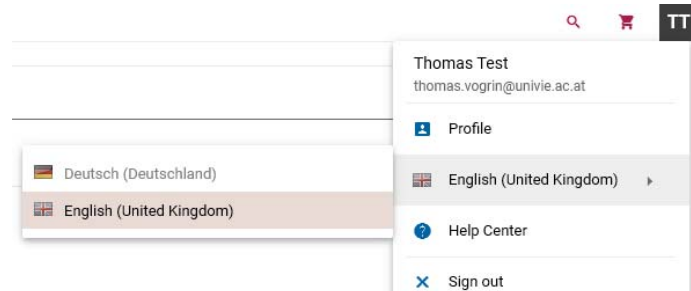
Direct link: <https://sam.univie.ac.at/wm>

- Access possible using all browsers
- Log-in via the u:account (u\u:account)



## Changing the language

To change the language of the user interface, click the profile button in the top-right corner and select the language of your choice. You can choose between German and English.



## Profile



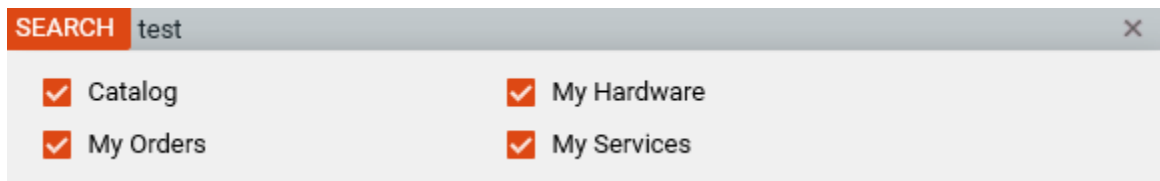
In your profile, you can configure the following settings, among others:

- language of notification e-mails
- delegate for approvals
- upload a profile picture

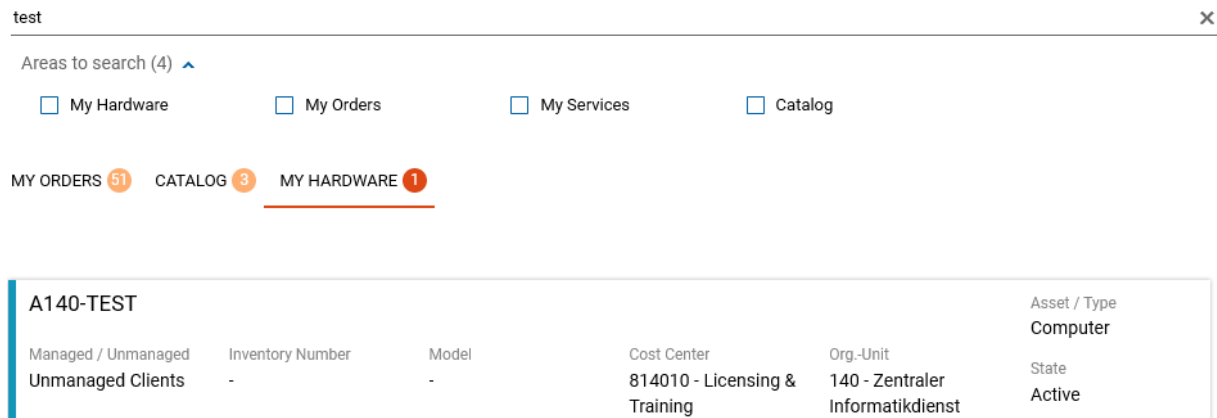
**Note about delegates:** If you are absent, you can define a delegate who receives all notification e-mails sent by the SAM application during your absence. To do so, please complete the fields *Delegated User*, *Start Date* and *End Date*. If you only complete the field *Delegated User* without specifying a start and end date, the substitution is permanently active. Any SAM notification e-mails are sent to your delegate as well.

## Searching the self-service portal

The self-service portal offers a search feature that allows you to search all areas of the portal. For example, you can search the areas *Catalog*, *My Orders*, *My Hardware* and *My Services* all at once.



In the example below, the search result shows hits in three areas:

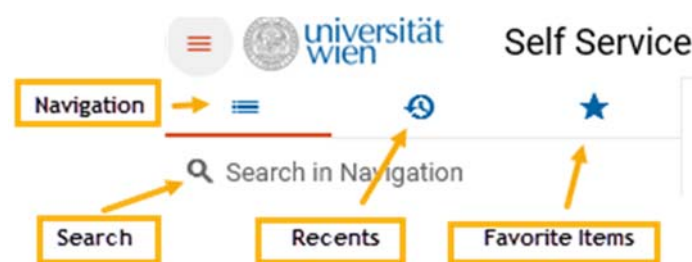


## Navigation area

You can navigate the self-service portal using the navigation area. Details about the individual objects are specified in the *Workplace*. For further information about the features of the navigation area, please see the section *Navigation items*.

## Using the navigation function

In addition to the navigation items, you can also view your history (Recents) and your favourite items. The search feature displayed here only allows you to search the navigation area.




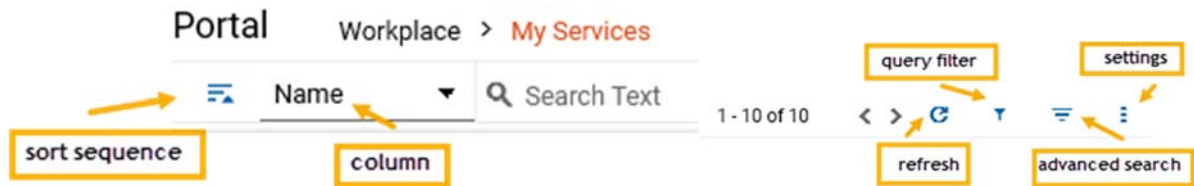
## Workplace

### Menu bar

The menu bar contains elements for sorting, searching, browsing, refreshing the display and showing the query filter bar, as well as the advanced search feature and the settings for the display of information.

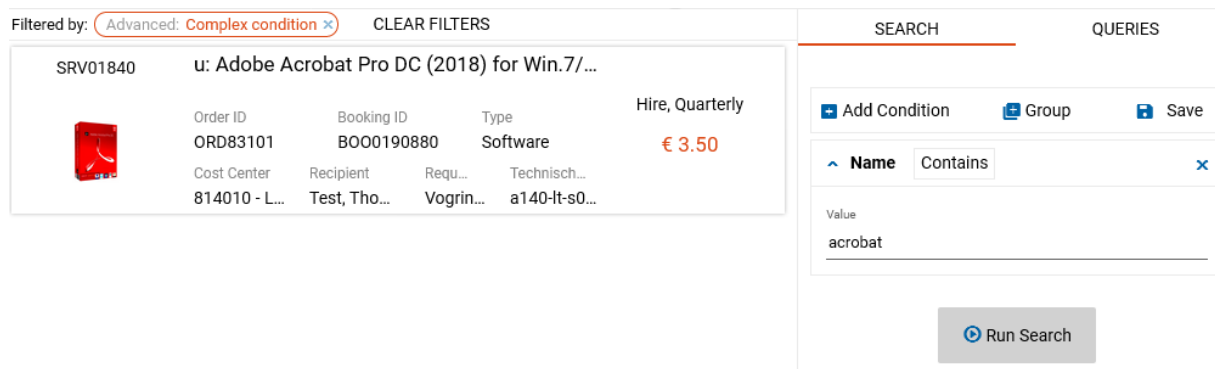
**Advanced mode:** If you have selected an order or an asset or something similar, you can switch to the advanced mode using the frame icon to enlarge the quick view.

**Please note:** The query filter icon  is only displayed if there are available queries.



### Advanced search



Using the advanced search feature, you can combine search terms by adding AND/OR and add conditions. You can save the search as a query.



The screenshot shows the advanced search interface. On the left, a table displays search results for 'SRV01840'. On the right, the search configuration panel is visible.

Order ID	Booking ID	Type	Hire, Quarterly
ORD83101	BOO0190880	Software	€ 3.50
Cost Center	Recipient	Requ...	Technisch...
814010 - L...	Test, Tho...	Vogrin...	a140-It-s0...

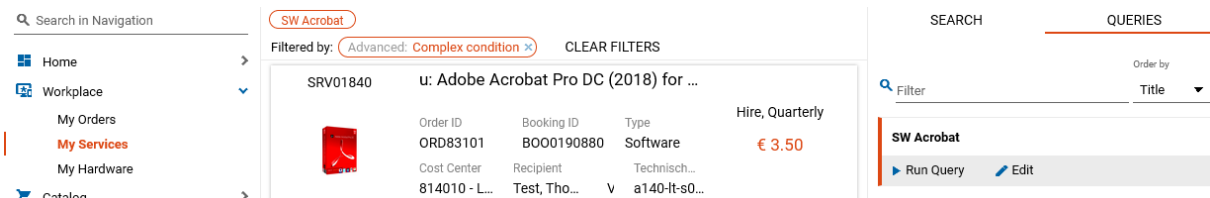
Search configuration panel:

- Filtered by: **Advanced: Complex condition**  CLEAR FILTERS
- SEARCH | QUERIES
- Buttons: Add Condition, Group, Save
- Condition: **Name** Contains 
- Value: acrobat
- Run Search button

### Queries

Queries are searches that you saved. You can display them in the query filter bar or use them in the navigation area. You can find them under *Advanced search/Queries*.

Example 1: Query filter *SW Acrobat* displayed under *Queries* in the query filter bar 



The screenshot shows the query filter bar with a saved query 'SW Acrobat' selected. The search results table is visible in the background.

Order ID	Booking ID	Type	Hire, Quarterly
ORD83101	BOO0190880	Software	€ 3.50
Cost Center	Recipient	Requ...	Technisch...
814010 - L...	Test, Tho...	Vogrin...	a140-It-s0...

Query filter bar:

- SEARCH | QUERIES
- Filter: **SW Acrobat**
- Buttons: Run Query, Edit

Example 2: Query filter *SW Acrobat* displayed in the Navigation area



SRV01840 u: Adobe Acrobat Pro DC (2018) for ...

Order ID	Booking ID	Type	Hire, Quarterly
ORD83101	BOO0190880	Software	€ 3.50
Cost Center	Recipient	Technisch...	
814010 - L...	Test, Tho...	v a140-It-s0...	

Navigation: Home, Workplace, My Orders, My Services, SW Acrobat

SEARCH: Filter, Order by, Title

SW Acrobat: Run Query, Edit

To display the query filter in the Navigation area, tick the following box in the query:

Show query in navigation

If you do not tick this box, the query is only displayed under *Queries* in the query filter bar.

You can remove any query you no longer need by clicking *Edit Query*. Next, click *MORE* and then *Delete*:

Edit Query

SW Acrobat

Cancel Save Done MORE

Delete

Add Child

Title: SW Acrobat

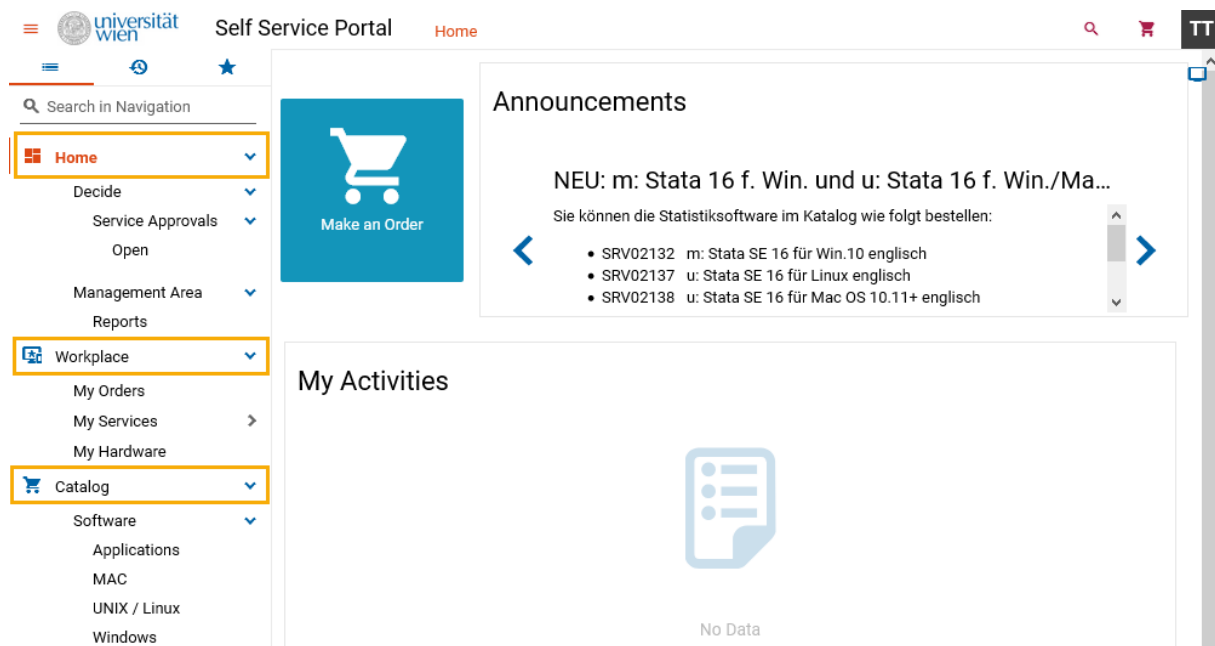
Description: [Empty text box]

Position: 0

## Navigation items

The navigation area contains a variety of navigation items that provide information about your orders, your hardware and the services assigned to you. In addition, you can order software from the catalogue or view approvals and reports.


**Please note:** You can only see navigation items (Decide, Management Area) for which you have the necessary permissions.



The screenshot shows the 'Self Service Portal' interface. The navigation menu on the left includes 'Home', 'Decide', 'Service Approvals', 'Open', 'Management Area', 'Reports', 'Workplace', 'My Orders', 'My Services', 'My Hardware', 'Catalog', 'Software', 'Applications', 'MAC', 'UNIX / Linux', and 'Windows'. The 'Home' menu item is highlighted with an orange box. The main content area features an 'Announcements' section with a shopping cart icon and a 'Make an Order' button. Below this is a 'My Activities' section with a document icon and the text 'No Data'.

## Home

Under *Home*, you can

- place a new order using the shopping cart icon 

The *Announcements* section provides an overview of

- new software and tips as well as information about planned maintenance work.

The *My Activities* section contains information about

- pending approvals, acceptances and current orders.

## Decide/Service Approvals

Approvals are only relevant for IT representatives and cost centre managers. They are in charge of assessing and approving or rejecting orders. You are involved as an approver in the orders displayed under *Service Approvals*.

**Open filter:** This filter displays any pending orders that await your decision. You can also see the orders displayed here under *Home/My Activities*.

## Management Area/Reports

This menu item is available to all *ReportViewers*. These include persons in management functions and *IT representatives* as well as basic users who are required to view different reports as part of their activity. The following reports are available:

- UniVie – Assets
- UniVie – Bookings
- UniVie – Cost centre invoice
- UniVie – Periphery
- UniVie – Quarterly invoices

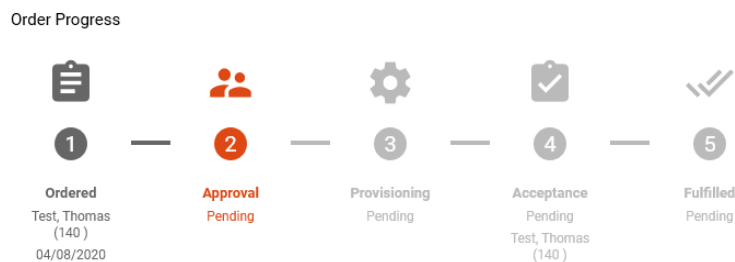
## Workplace

Consider the *Workplace* as ‘your’ personal work space. It contains information about your orders, ordered (and provided) services and your hardware.

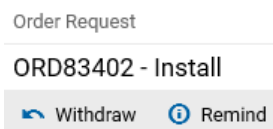


## My Orders

This menu item provides an overview of all orders you have placed. If you click an order, further details are displayed in the quick view. For example, you can see the order progress:



You can also withdraw your order here (provided that it has not yet been approved) or send a reminder to the approver:



## Types of orders:


- Install: orders for services to be installed
- Uninstall: orders for services to be uninstalled
- Repair: orders for services to be repaired  
Please note the information provided in the section *The order process/Repairing software*.
- Adjustment: orders for adjustments to existing services  
With this type of order, a service assigned to a specific object (person, asset) is adjusted by changing the owner or main user.

## My Services

The *My Services* section provides an overview of all your services. All services displayed here have the status *provided*, i.e. software has already been installed on managed clients and/or has been provided for download from the SWD server for unmanaged clients. If you click a service, the quick view containing the relevant details of the order appears.

You can return services that you no longer need here:

B000191443 - Install - u:




 Return

### My Hardware

The *My Hardware* section displays the hardware assigned to you as the main user. It mainly contains computers, but may also contain peripheral devices, such as monitors. The quick view provides further information about the individual objects.

### Catalog

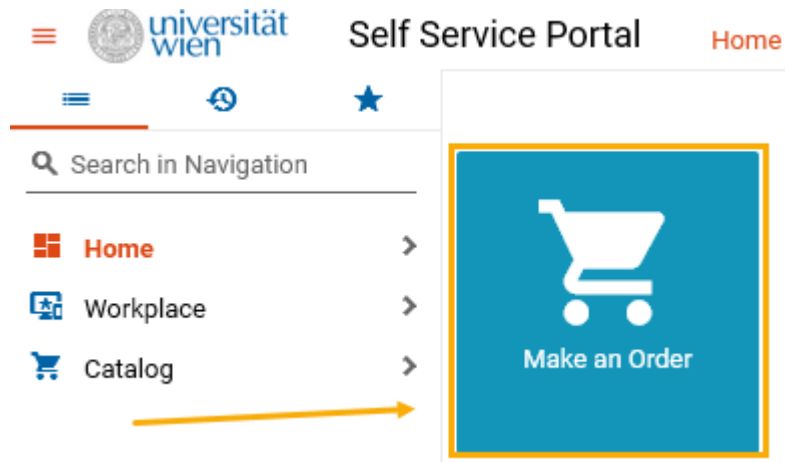
The *Catalog* contains a list of all services that you can order. The navigation item *Software* contains additional filters:

-  **Catalog** 
- Software 
- Applications
- MAC
- UNIX / Linux
- Windows

## The order process


### Ordering software

You can order services either via the homepage of the self-service portal or via the *Catalog*.



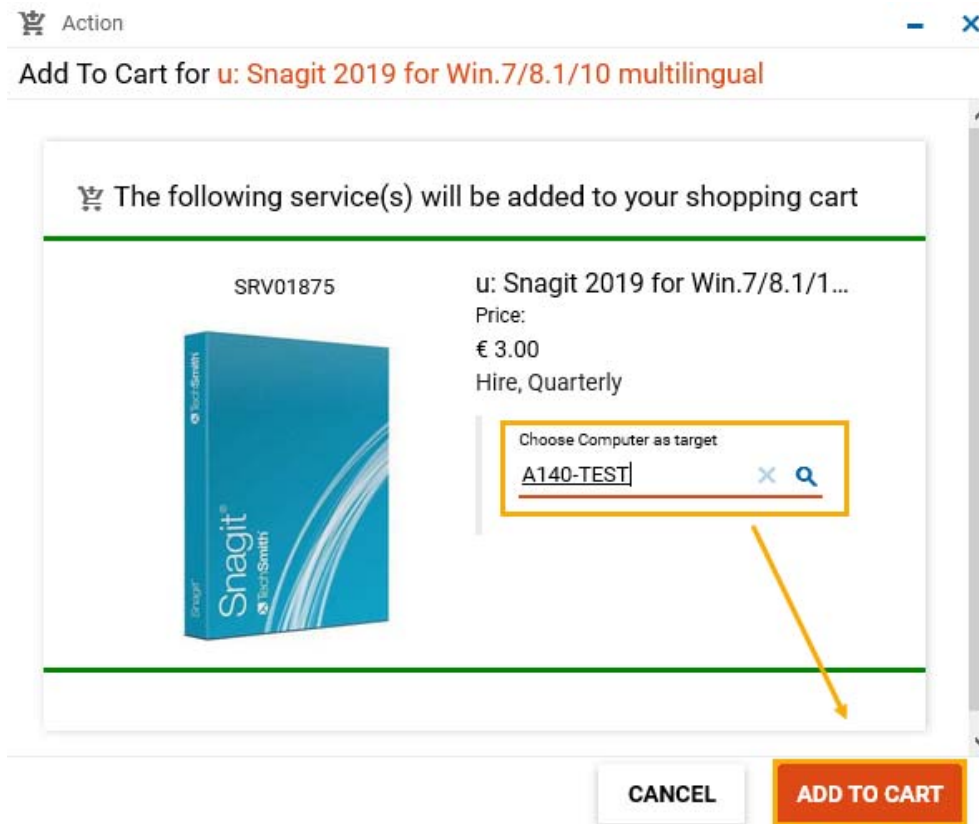
To do so, enter parts of the service name into the *search field* or limit the selection by filtering the search results according to the relevant operating system (*MAC, Unix/Linux, Windows*) and browse the catalogue.

The screenshot shows the 'Self Service Portal' interface. At the top left is the 'universität wien' logo. The main header includes 'Self Service Portal' and 'Catalog'. A search bar at the top right contains the text 'snagit'. Below the search bar, a filter bar indicates 'Filtered by: Keyword: snagit x' with a 'CLEAR FILTERS' button. The recipient is identified as 'Test, Thomas (140)'. The main content area displays a software item with ID 'SRV01875' and a 4-star rating. The title is 'u: Snagit 2019 for Win.7/8.1/10 multilingual'. Below the title is an image of the Snagit software box. Underneath the image, it says 'for Unmanaged Clients Screen capture and video'. At the bottom of the item, there is a red 'ADD TO CART' button and the price '€ 3.00 Hire, Quarterly'. A yellow box highlights the 'Catalog' menu item in the left sidebar, and another yellow box highlights the search input field. A yellow arrow points from the search input field to the 'ADD TO CART' button.

**Please note:** If you would like to order software for somebody else, click the gear  and select the relevant person.


This screenshot shows a dropdown menu for selecting a recipient. At the top left is a gear icon. The menu header includes 'Name' and a search field labeled 'Search Text'. On the right, it shows '1 - 50 of 318' and navigation icons. The recipient list shows 'Test, Thomas (140)'. A yellow arrow labeled '1.' points to the search field, and another yellow arrow labeled '2.' points to the search icon.

Once you have found the service you would like to order, add it to the cart and select the relevant technical target, if applicable: *Choose Computer as target*. **Please note** that you may only select computers that are assigned to you as the main user (see *Workplace/My Hardware*).







If you need further services, search for them in the catalogue and add them to the cart as well.


**Please note:** When selecting services, please consider the information about different types of services provided in the section *SAM Introduction – Managed/Unmanaged Clients (Services)* of this user guide.

Note that the cart icon changes with every software that you add . In this example, the user added another service to the cart and selected different hardware as its target.

**Note about cost centres:** You can change the cost centre for your order under *Recipient Information*.

 Action   

### Shopping Cart

 Shopping Cart Items ✕ Clear

---

SRV01875 u: Snagit 2019 for Win.7/8.1/10 multilingual ✕  
Target (Computer)  
A140/TEST ✕ 🔍 = 1 + € 3.00  
Hire, Quarterly

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SRV02032 u: Nero 2019 Premium for Win.7/8/10 multilingual ✕  
Target (Computer)  
a140/s0011 (server11) ✕ 🔍 = 1 + € 3.50  
Hire, Quarterly

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Contained Installation Costs	
Total Purchase And One-Time Costs	-
Total Recurring Costs in 1 Year	€ 26.00
<b>Total Price (Including First Year Costs)</b>	<b>€ 26.00</b>

#### Recipient Information

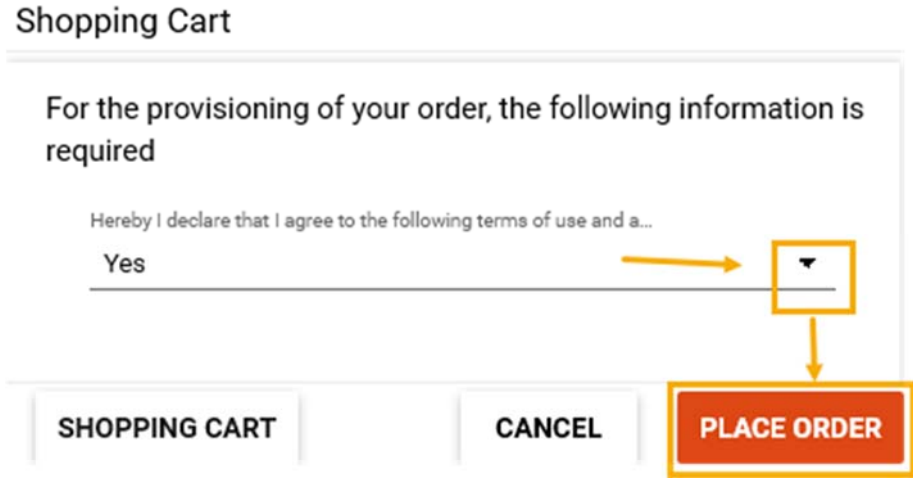
Cost Center  
814010 - Licensing & Training ✕ 🔍

Comments  
I need the software. 

**CANCEL** **ADDITIONAL ORDER INFORMATION**



Click *Additional order information* and agree to the *Terms of use for standard software* by selecting 'Yes' in the pop-up window:



By following all of these steps, you have successfully placed an order. As soon as your order has been processed successfully (approved and provided), you will be asked to accept the order on the homepage.

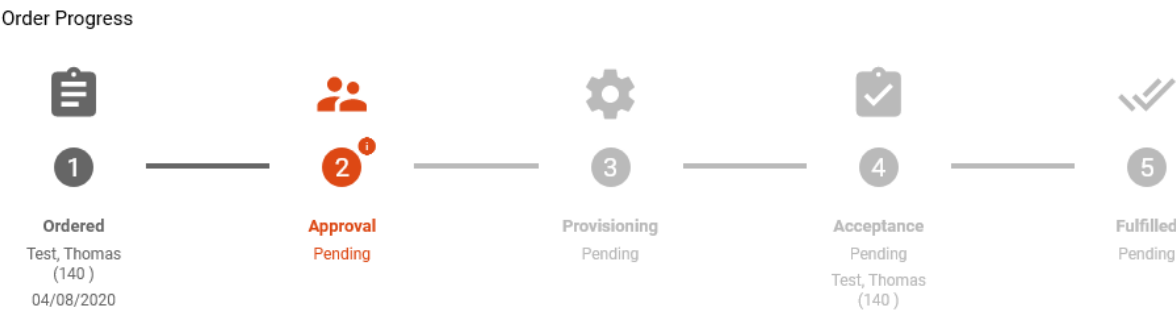
**Note about managed client/timely installation:** When ordering software for a managed client, you can restart the client 10 minutes after placing the order to start the installation process, provided that the order has already been approved. Do not log in to the client as this would prevent the installation.

**Note about managed client/version change:** If you would like to upgrade a software to the latest version (e.g. from MS Office 2016 to MS Office 2019), please note the following: You first have to request the uninstallation of the software and **wait for completion** before ordering the new version. This will help avoid problems during the uninstallation/installation.

**Note about platforms:** Problems will occur if you try to install interrelated software offered by different platforms on one client. For example, MS Office x32 is not compatible with MS Visio x64. In such cases, please select versions offered by the same platform.

You will receive notification e-mails informing you about the order progress throughout the entire order process.

*Example order progress:*

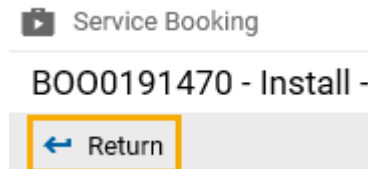


**Note about accessing the SWD server:** If you order software for colleagues, only the recipient can access the software on the SWD server. Only the recipient can download the software.

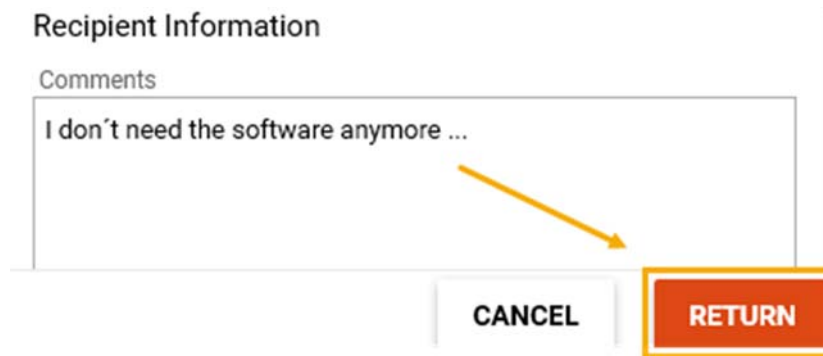
**Note about installing unmanaged software:** Follow the installation notes provided on the SWD server for the software you downloaded. This will help avoid problems during the installation process.

### Returning software

To return software that you no longer require, please select the relevant service under *Workplace/My Services*. Then click *Return*



and confirm this action by clicking the *Return* button.

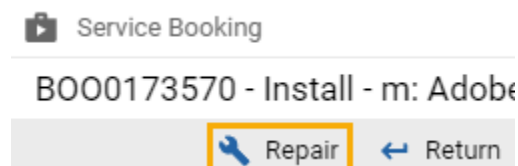


You now have successfully requested the return of the software. You will receive notification e-mails informing you about the order progress.

**Please note** the installation notes at the end of the section *Ordering software*.

### Repairing software

If you encounter problems with a software installed on your client, reinstalling the relevant software might help. You have to reinstall unmanaged software packages yourself. For managed software packages, you can use the *Repair* function.



To do so, select the relevant service under *Workplace/My Services* and click the *Repair* button.

Comments

Software does not work anymore :(

CANCEL REPAIR

A screenshot of a web form titled 'Comments'. The form contains a text input field with the text 'Software does not work anymore :('. Below the input field are two buttons: 'CANCEL' and 'REPAIR'. The 'REPAIR' button is highlighted with a yellow border, and a yellow arrow points from the text in the input field to the 'REPAIR' button.

You will receive notification e-mails informing you about the order progress.

**Please note:** You cannot place any new orders before the repair process has been completed.


**Please note** the installation notes at the end of the section *Ordering software*.

## The approval process


To approve or reject an order, select the relevant order in the *Home* area or under *Home/Decide/Service Approvals/Open*. Then click either *Approve All* or *Decline All* in the quick view that is displayed.

### Order Request



#### ORD83459 - Install



 Approve All  Decline All

If you would like to only approve specific parts of an order, untick the relevant boxes and then click *Decide*.



Please, proceed with Approval. Selected services (highlighted in green) will be approved, deselected (highlighted in red) will be declined.

	Service	Approvals	Quantity	Payment Method	Price
<input checked="" type="checkbox"/>	 <b>u: Snagit 2019 for ...</b> SRV01875	<b>Me</b>		Hire, Quarterly	€ 3.00
<input type="checkbox"/>	 <b>u: Nero 2019 Premi...</b> SRV02032	<b>Me</b>		Hire, Quarterly	€ 3.50

Next, provide a reason for your decision and continue by clicking *Approve Bookings*.

Comments

Nero is too expensive ...

**Note about notification e-mails:** You can also approve, reject or view the orders that await your decision directly via the notification e-mail you received:

Please choose from the following options:

**Approve:**

[Click here to approve.](#)

**Decline:**

[Click here to decline.](#)

**View Details:**

[Click here to open the order in your web browser.](#)

## FAQs and further information

The cost centre manager(s) is/are not assigned correctly. What can I do?

Please contact the Accounting and Finance service unit.

I cannot select my client for the software I want to order. What can I do?

Please contact your IT representative, who will be able to help you solve this issue.

The user log-in does not work. What can I do?

Your user account is locked if you have entered an incorrect user name or password five times in a row. You can try to log in again after 60 minutes. If you are still not able to log in, please file a ticket with the service desk at:

<https://servicedesk.univie.ac.at/servicedesk/customer/portal/17>

### Inventory tools: TIT/SAM

You can use the following tools to inventory unmanaged clients using the system *Empirum* in SAM:

- TIT (*TAP Inventory Trigger*) for Windows clients
- SAM for macOS clients

**Please note:** Linux clients have to be created manually.

Please note that the *Inventory* is not being updated continuously. By running TIT/SAM, you inventory your client once. This process is not repeated automatically. Your IT representative has to manually enter any later changes to the client (IP, MAC, etc.).

Take the following steps to inventory a client:

- Log in to the client you would like to inventory using an administrator account.
- Download the inventory software (available for free) from the SWD server <https://swd.univie.ac.at> and follow the instructions.

**Please note** that it might take up to four hours for the just inventoried client to be displayed in SAM. The client is first created in the unmanaged Empirum instance and is only transferred to SAM when Empirum next connects to it. The organisational unit/cost centre manager and the main user are assigned in the following steps.

### Common issues with TIT:

- The transfer of inventory data occasionally does not work properly. In this case, please try again. Wait four hours before checking whether the client is now displayed in SAM. If the client is still not displayed after your second attempt, please file a ticket with the service desk at:  
<https://servicedesk.univie.ac.at/servicedesk/customer/portal/17>  
**Note about VPN:** You need a VPN connection to transfer data outside the data network of the University of Vienna.
- If you use an e-mail address other than your University of Vienna e-mail address (firstname.lastname@univie.ac.at), the main user cannot be assigned to the client correctly. When opening TIT the next time, you will receive an e-mail informing you that the computer name already exists. In this case, please file a ticket with the service desk at:  
<https://servicedesk.univie.ac.at/servicedesk/customer/portal/17>