

WHITE PAPER

Setting and Enforcing Desktop Standards Using IT Asset Management Tools

Introduction

As technology infrastructure becomes increasingly complex and distributed, IT departments have more and more difficulty keeping track of how many desktops they have, much less what software is installed and running on those desktops. The chaos that governs the desktop environment drives up support costs, compromises user productivity, and can threaten corporate security; the consequences of which come at a great price. Without ways of bringing these costs under control and keeping employees working efficiently, new technology initiatives—which so many IT departments are under the gun to deliver—cannot be pursued or delivered successfully.

One way to overcome the chaos and reduce costs is to introduce and enforce desktop standards. Defining a standard desktop means there are fewer applications to purchase and support, which, in turn, reduces costs across job functions in an organization—from IT staff, to knowledge workers, to purchasing agents. For the same reasons, establishing a standard desktop also means fewer help desk calls, quicker resolution time for support incidents, and fewer applications to train help desk staff and employees on. Technology migrations can be performed more quickly because workstations can be treated uniformly. Organizations can enjoy reduced software licensing fees and better negotiating power with software vendors due to the ability to purchase fewer titles in greater volumes. Companies are better protected, because they can restrict the use of applications that could result in compromised network security, intellectual property loss, or potential litigation surrounding inappropriate use of technology. Finally, a standard desktop means more productive end users, all of whom have the right set of applications to perform their jobs, with fewer compatibility issues and limited or no access to time-wasting software.

Setting desktop standards

If you are starting a new business and purchasing all new PCs, setting a desktop standard is easy. You decide what everyone will use and order PCs with a standard image. Most organizations, however, do not have the luxury of building their PC infrastructures from scratch. They must start where they are, which is often in the midst of disorder. If this is the case for you, the first thing it is recommended you do is take an inventory of your environment.

STEP 1: Perform a baseline inventory

There are two approaches to conducting an inventory: manually or using an automated tool. Conservative estimates for a manual inventory are 30 minutes per PC, while an automated process is significantly faster and more accurate.

A baseline inventory will tell you how many PCs you have, along with their hardware and software configurations. You will need to decide how much you want to know about your PC hardware. At a minimum you should collect information on CPU speed, RAM, size of hard drive, free disk space, serial number, and NIC address. Inventory tools which support PC information standards such as WMI will allow you to collect much more data about each machine, such as chip set, video card, type of modem installed, which mouse is being used, and so on. This information can be valuable, for example, if you notice that a particular video card is prone to failure, and you want to replace that card across your environment. A good inventory tool will show you instantly which PCs have the defective card.

Once you determine which applications will comprise your standard desktop, you may need to upgrade some hardware in order to accommodate the authorized set of applications. With hardware inventory data, you will know which machines need hardware upgrades.

An inventory will also tell you exactly what software is installed on your desktops. You may be surprised at what your inventory reveals. Most organizations have far more programs installed than the IT department is aware of (or has purchased licenses for). And more often than not, inventories uncover the presence of potentially problematic applications such as games, chat, or P2P programs that may compromise productivity, network performance, or the security of intellectual property.

Raytheon Missile Systems is an example of an organization that uses an automated PC inventory tool to identify and root out unauthorized applications and hardware. Because of the nature of its relationship with the U.S. government, Raytheon maintains the strictest of security standards pertaining to installed hardware and software. Specifically, Raytheon prohibits the use of certain peripherals such as wireless, infrared, or Blue Tooth equipment, as well as restricts the use of games, open source software, and applications developed in foreign countries.

In order to maintain its security policies, Raytheon regularly inventories its PCs and peripherals to identify any unauthorized equipment or software installations. If Raytheon's Information Systems Security Officer learns of equipment on the premises that has unauthorized capabilities (such as a printer with wireless functionality), or a game that is being used, he can simply enter the serial number for the printer or the executable name of the game into the PC inventory tool to identify the machines on which they reside. With an automated inventory tool to deliver this critical information, Raytheon is able to inventory its IT assets on a regular basis and, when necessary, take the corrective action, resulting in a more standardized, protected environment.

STEP 2: Collect software usage information

Once you know what is installed across your network, you can begin to determine what your standard desktop should include. The goal of setting a desktop standard is to reduce costs and boost security without sacrificing end users' access to applications that they need. However, using the same desktop standard for everyone in the organization may not be practical or appropriate. Instead, consider establishing standards according to department or job function. The set of applications used by Engineering will inevitably be different from those required by the Marketing or Accounting departments. This is where software usage data enters the picture.

To find out which applications should be part of the standard, you need to know what programs are actually being used. A "software usage tracking" or "metering" tool can show you exactly which applications are utilized most frequently, as well as which applications are never used or not used enough to justify their ownership. To get a good representation of usage, you should track usage for at least 30 days—longer if your schedule permits. By tracking software usage, you will obtain the information you need to determine which applications to incorporate into your standard desktop(s). It will also show you how frequently nonproductive or potentially unsafe programs are being used within your organization and which applications you may therefore want to lock out of your desktop environment.

STEP 3: Clean up the environment

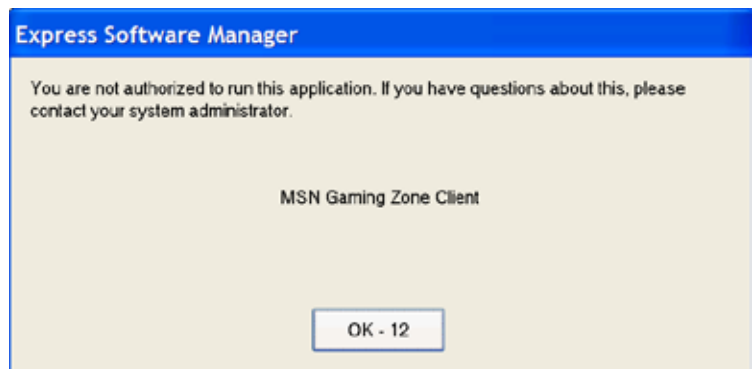
Once you have combined inventory and usage information to decide which applications will comprise the standard desktop(s), you must decide whether to remove nonstandard applications from the desktops or prevent users from running them altogether. If you decide to remove them, you can use the inventory data you collected to identify where they reside. If you decide to leave them on the desktops but prevent employees from using them, you will need a way to lock them out.

STEP 4: Enforce your desktop standards

The most effective method for enforcing standards is a complete lockdown of the desktop, which is typically accomplished by using Group Policies. However, there may be political obstacles to such a method, as limiting employees' autonomy may be viewed negatively. One way to overcome objections is to emphasize reduced costs, increased productivity, and a higher level of network and company security. A standard, locked-down desktop can also speed new technology roll-outs because implementations can be thoroughly tested using scenarios that are not changing from day to day. However, depending on

the needs of your organization and its employees, it may not be practical or desirable to categorically prevent programs that are not part of the standard from being installed and used.

If a complete lockdown is not possible, there are other methods for enforcing standards. The software usage tracking/metering tool you used to help set your desktop standards may also have "application control" functionality to help you enforce them. Some tools can accomplish what is, in essence, a lockdown by not allowing users to run applications that are not designated as standard. When an end user tries to run a nonstandard application, the tool can block the launch and deliver a message indicating that use of the application is not authorized.



Express Software Manager Professional gives you a way to prevent users from running certain applications.

If desired, you may also have the option of configuring your metering tool to give users a bit more leeway. For example, instead of preventing the launch of a nonstandard application, the tool might warn the user that he or she is in violation of standards and grant that user a grace period. Or the tool could simply watch quietly for violation of standards you have communicated to your employees and alert you when a user launches an unauthorized application. At this point you can take the appropriate action.

Creative uses for software metering technology

Because metering agents sit on the desktop and observe the launch and close of every application, metering technology has many uses in addition to setting and enforcing standards. For example, knowing how often specific applications are being used—and which licenses are not being used—can help organizations maintain license compliance without overbuying software licenses. Metering can also be a powerful tool to combat viruses. When a new virus strikes and you know the name of the executable, you can configure your metering tool to prevent its launch and thus contain potential damage. You can also use metering to prevent employees from running applications downloaded from the Internet until you test them to see how they will behave in your environment.

Summary

Desktop standards can go a long way toward bringing order to the chaos that so often prevails in the PC environment. A combination of inventory and software usage tracking/ metering technology can help you decide what standards to establish, as well as assist you in ensuring that those standards are maintained. As a result, your organization will likely achieve new measures of security, worker productivity, and savings on software licenses and associated support.

About Express Metrix

Express Metrix has proven leadership in software license metering and asset management software during more than 11 years of experience focused on this field and through its installed base of over 1,100 active customers. Winner of the 2005 Software Asset Management Partner of the Year award from Microsoft, Express Metrix solutions allow enterprises to ensure software license compliance, plan for technology migrations and software upgrades, and effectively manage their IT assets and budgets.

Express Metrix offers a suite of software asset management tools that provide the streamlined solutions companies need to conduct in-depth analysis and management of desktop PCs and applications. The Express product line includes Express Software Manager Professional®, Express Software Manager Standard®, Express Inventory® and Express Meter®. Express Metrix currently holds Gold Certified Partner status in the Microsoft® Partner Program. More information on Express Metrix can be found on the company's web site at www.expressmetrix.com.



200 West Mercer St, Ste 300
Seattle, WA 98119 USA
+1.206.691.7900
+1.206.691.7901 Fax
info@expressmetrix.com
www.expressmetrix.com