



CAM 14.2 Purchasing

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Purchasing









Purchasing is the web application for entering, viewing, and analyzing purchasing data for software and hardware in your environment.

Login Screen

This topic includes sections that are noted as only relevant in certain configurations:

 Hosted installations;  On-premises installations;  CSM authentication;  CAM authentication

Enter the following information:

-   User name—Your user name, in domain\user name format. Your user name must be a valid user name in the CAM Database, with permission to run Purchasing.
-   Password—Your password for the domain, if required.
-   User name—Your Cherwell Service Management user name.
-   Password—Your Cherwell Service Management password.

After you log in, see [Getting Started with Purchasing](#).

What's New in Purchasing

In Cherwell Asset Management version 13.2, functionality was added to License Analytics to support analysis of licensing for [Microsoft SQL Server](#). Purchasing supports that functionality with some new fields and formerly optional fields that are now required, including the following.

Status Panel

If your to-do list on the right includes a yellow **Exceptions** section and you use [License Analytics](#) to analyze SQL Server licensing, click this link to accomplish tasks necessary for generating meaningful data for analysis. Upgrading customers will see this section if you added purchasing data for SQL Server in earlier versions of CAM.

Assignments

- The [Edit Assignments Dialog Box \(for Non-computers\)](#) includes an option for marking the machine to which the SQL Server line item is assigned as a passive SQL Server.
- New **Add Assignment** and **Add Multiple Assignments** buttons let you quickly add more assignments.

Contracts

- New volume contract options let you provide details on how you manage compliance with SQL Server licensing agreements.

Line Items

- Software line items reconciled to certain SQL Server editions now show the number of licensed cores or processors next to the License Quantity field.

See Also

- The License Analytics application was updated to support this functionality; you'll see a list of these changes when you launch it.
- For a complete list of new features in Cherwell Asset Management, see [../cam_whats_new/cam_whats_new_list.xml#concept2207](#).



Note: If you are migrating from a pre-11.0 version, please view [Migration Help](#)

Using CSM Authentication

If you are enabling CSM authentication on a new Cherwell Asset Management installation (new CAM Database), you need to migrate one access profile that is bound to several built-in contracts provided

within Purchasing. After you enable CSM authentication from CAM Administrator, relaunch Purchasing, log in with a CSM user that has Purchasing Administrator rights, and do the following:

1. From the Status page, click the Administration tab, then click **Migrate Access Profiles** in the left navigation pane.
2. Click the **Migrate link** next to Purchasing Administrator.
3. Select **Administrator (CSM)** from the list.
4. Click **Migrate**.

The built-in contracts are updated to use the correct CSM-based profile.

Related information

[../cam_administrator/admin_csm_authentication/Admin_Overview_Authentication.xml#concept6703](https://cam_administrator/admin_csm_authentication/Admin_Overview_Authentication.xml#concept6703)

How to Customize Views in the Orders, Line Items, and Contracts Panels

When you make a selection in the left pane of the Orders, Line Items, and Contracts panels, the right pane updates to show records relevant to your selection. You can customize which of the available columns appear here (including any custom columns you created in your purchasing records) and sort the contents of each column. Using the [Search](#) feature, you can also search for items by column.

- To change which columns appear, right-click on a column. Click Columns, and then mark or clear the columns you want to display or hide.
- To change the order in which columns appear, click and drag columns to rearrange them.
- To sort the items within a column, right-click the column and select Sort Ascending or Sort Descending.

How Many Columns Are Displayed?

You can use up to the following number of columns in orders and contracts:

- 10 custom text, shortcut, or list fields
- 10 date fields
- >10 number or currency fields

Only the first ten of each above category are available to be displayed, and these first ten are based on the order of the custom fields, which you can change.

In line item grids, you can use up to 7 line item custom fields of each type and 3 order fields of each type.

Getting Started with Purchasing

The following steps are recommended to help get you started. You don't have to strictly follow all steps in order, but they provide a general guideline for getting the most out of Purchasing.

Part 1. Before Entering Information

- Decide if you want to enter or import purchase details. For example, if you have an existing spreadsheet of purchase records, you can start by importing that information, and then enter information about future purchases as needed.
- Determine if you want to create custom order fields or custom line item fields. Once you've created custom fields, you can then fill in those fields as you enter orders and add line items to them.
- Determine if you want to use contracts to ensure compliance with your licensing agreements. You can create contracts at any time, but by creating them before you enter purchasing information, you can easily apply line items to contracts as you create the line items. Note: If you plan to use License Analytics to analyze purchasing data, you'll need to perform some steps in CAM Administrator and Purchasing. It's strongly recommended that you refer to [Best Practices and Purchasing](#) for complete instructions.
- If you plan to use CSM authentication, see [How to Set Up CSM Security Groups, Teams, and Users](#) for procedures to complete in Cherwell Service Management before proceeding.

Part 2. Entering Purchasing Information

As mentioned above, you can use either method or a combination of both to enter purchasing information.

Importing Purchasing Information

Follow these steps, in order:

1. [Prepare CAM Administrator for importing purchasing data](#)
2. [Prepare Purchasing for importing purchasing data](#)
3. [Prepare your spreadsheet](#)
4. [Import data into Purchasing](#)

Entering Purchasing Information

To enter, rather than import, information, follow these steps. You can switch up the order of the steps, especially when editing orders and line items later on, but it's best to follow this order when getting started.

1. [Enter a new order](#). Optional: You can also [attach purchasing documents](#) to an order.
2. [Add line items to an order](#). Optional: You can also [associate line items with contracts](#) to help ensure compliance with [product use rights \(PURs\)](#). See the Note, above.

Part 3. Assigning and Reconciling

You may perform these tasks as you fill in the fields when you enter an order or line item, but there may be times when you don't have the information you need. Click one of the following for help performing these tasks after the order or line item was initially entered:

- [Assign purchases to individuals or machines, and then to organizational units or groups](#)
- [Reconcile purchases to IT asset inventory](#)

Part 4. Housekeeping

It's a good idea to:

- Check the Status panel often, to evaluate purchasing data you've collected so far.
- Address any outstanding tasks and reminders by clicking on their hyperlinks.

Part 5. Other Tasks

The above lists the basic steps for getting started with Purchasing. For a complete list of the tasks you can perform, see [How to....](#)

CAM API Documentation

The CAM API is the collection of web services that allows you to interchange data with external systems. For more information, see the [CAM API Documentation](#).

Purchasing Panels



Status Panel

This panel presents a current, graphical view of the purchasing data you've collected thus far, as well as a convenient way to perform any outstanding tasks and address any reminders.

The charts presented here are called "dashboard charts." Dashboard charts take up the bulk of the screen, with a to-do list on the right.

Dashboard Charts

You can customize this section in these ways:

- To hide a dashboard chart, click the  at the chart's top right corner, and then click Remove. Some charts also have an Edit option you can click to change what data you want displayed; click Done to save those changes.
- To see charts not currently shown, click the  at the top left of the panel, and then click Add Panels. Select one or more charts from the list that's then shown. When you're finished selecting charts, click Done at the bottom of the list to update the Dashboard display.

To-do List

Your to-do list is shown on the right, grouped by category. Depending on your situation, all categories may not be shown.

- If your list includes a yellow **Exceptions** or **Migrate** section and you use License Analytics to analyze SQL Server or Windows Server licensing, click on these links to accomplish tasks necessary for generating meaningful data for analysis. Upgrading customers will see these sections if you added purchasing data for these Microsoft products in earlier versions of CAM before functionality for analyzing these products was added. (Support for SQL Server licensing analysis was added in CAM 13.2; support for Windows Server was updated in CAM 13.0.)
- The **Reminders** section provides the current status of your leases, contracts, and maintenance agreements, so you can quickly tell which ones may be expiring or need attention soon.
- The **Tasks** list presents an at-a-glance summary of the status of your purchasing information. Click any task or reminder to jump to the location where you can complete that task. These lists update as you complete tasks; you should check them periodically, especially after importing purchasing data.
- The **Import** section provides a link to a wizard you can use to import purchasing data.

Common Tasks in the Status Panel

It's a good idea to check the Status panel often, to evaluate the purchasing data you've collected so far, and to address any outstanding tasks and reminders by clicking on their hyperlinks. You can also do the following in the Status panel:

- [Customize dashboard charts](#)
- [Import purchasing data](#)
- [Migrate line items to core-based licensing](#)
- [Manage line item exceptions](#)

Orders Panel

Use the Orders panel to create, edit, and view purchase and lease orders.

Layout of the Orders Panel

The layout of the Orders panel includes a list of categories in the left pane and a toolbar at the top right (visible when a category on the left is selected). The right pane, the largest area of the panel, is where you can view and modify orders. The right pane changes according to whatever you select in the left pane, and Purchasing "remembers" where you were last in your current browser session.

Toolbar

The Order panel's toolbar includes the following buttons:

- **Add purchase**—Click to begin a new purchase order.
- **Add lease**—Click to begin a new lease order.
- **Search**—Click to [search](#) for order information. The toolbar expands to include a line where you enter your search criteria.
- **Refresh**—Click to refresh the contents of the right pane.
- **Export to Excel**—Click to export the contents of the right pane to an Excel spreadsheet. You'll be prompted to open the results or save them to a file in the path you choose.

Note: Available toolbar buttons vary depending on your current selection or task.

Left Pane

When you click an item in the left pane, the right pane updates to show relevant information:

- **Information**—Provides an overview of how to create and edit orders.
- **All Orders**—Lists all orders, with subcategories for Purchase orders and Lease orders. Since leases usually have time restrictions, there are also categories for expiring and buyout notifications. Click a subcategory to view, edit, and delete orders.

Right Pane

The right pane updates with your selection in the left pane, showing the records that pertain to your selection on the left, as described above.

Related information

[Purch_Common_tasks_in_the_Orders_panel.xml#concept607](#)

[Purch_How_to_customize_views_in_the_Orders_and_Line_Items_panels.xml#concept1434](#)

Common Tasks in the Orders Panel

The following are common tasks you're likely to perform in the Orders panel. Click any listed item for step-by-step instructions.

- [How to add line items to an order](#)
- [How to add purchasing information](#)
- [How to assign hardware maintenance to a single existing hardware item](#)
- [How to customize views in the Orders and Line Items panels](#)
- [How to enter an order](#)
- [How to view an order's history](#)

Line Items Panel

Line items are the items that make up an order. For example, an order for a new computer might include the CPU itself, a monitor, software, and software maintenance.

Use the Line Items panel to view and edit previously entered line items. You can also assign line items to groups, users, and machines here, and reconcile line items based on their type, or you can go to the Assign and Reconcile panels to handle these tasks.

Layout of the Line Items Panel

The layout of the Line Items panel includes a toolbar at the top of the right pane and a list of line item categories in the left pane. The right pane, the largest area of the panel, is where you can view and modify line items. The right pane changes according to whatever you select in the left pane, and Purchasing "remembers" where you were last in your current browser session.

Toolbar

The following buttons appear in the top right of the panel:

- **Search**—Click to [search](#) for order information. The toolbar expands to include a line where you enter your search criteria.
- **Refresh**—Click to refresh the contents of the right pane.
- **Export to Excel**—Click to export the contents of the right pane to an Excel spreadsheet. You'll be prompted to open the results or save them to a file in the path you choose.

Left Pane

When you click an item in the left pane, the right pane updates to show relevant information:

- **Information**—Provides explanatory text on the components of this panel and how to use it.
- **All Line Items**—Lists all current line items, with subcategories for Hardware, Hardware Maintenance, Software, Software Maintenance, and Software Upgrade. You can click an item's Edit link to edit this line item, or click an order number to edit the order that contains the line item. You can also click the Assign link to edit an item's assignment.
- **Expiring**—Lists all maintenance agreements that are set to expire within the number of days specified in the Preferences panel (30 days is the default), with subcategories for hardware and software. You can click an item's Renew link to renew this line item, or click an order number to edit the order that contains the line item.
- **Line Item Exceptions**—Lists any line items exceptions, grouped by type: Missing Contract (any line items that are reconciled to a License Analytics title but are not associated with a contract) and Missing Quantity Units (line items where the quantity unit needs to be specified). See [How to Manage Line Item Exceptions](#).

Right Pane

The right pane updates with your selection in the left pane, showing the records that pertain to your selection on the left, as described above. You can click an item's Edit hyperlink to make changes to it, its referenced order number to view information about the entire order, or its Assign hyperlink to assign the item.

Related information

[Purch_Common_tasks_in_the_Line_Items_panel.xml#concept584](#)

[Purch_How_to_customize_views_in_the_Orders_and_Line_Items_panels.xml#concept1434](#)

Common Tasks in the Line Items Panel

The following are common tasks you're likely to perform in the Line Items panel. Click any listed item for step-by-step instructions.

- [How to Assign Line Items](#)
- [How to Customize Views in the Orders, Line Items, and Contracts Panels](#)
- [How to Apply a Contract to a Line Item](#)
- [How to Delete or Change a Contract/Line Item Association](#)
- [How to Manage Line Item Exceptions](#)

Assign Panel

Use the Assign panel to edit and view how line items are assigned to specific machines or users, or assigned to groups (for example, a specific department).

Layout of the Assign Panel

The layout of the Assign panel includes a list of categories in the left pane and a toolbar at the top right (visible when a category on the left is selected). The right pane, the largest area of the panel, is where you can view and modify assignments. The right pane changes according to whatever you select in the left pane, and Purchasing "remembers" where you were last in your current browser session.

Toolbar

The Assign panel's toolbar includes the following buttons:

- **Reassign selected items**—This button is only available when you select one of the subcategories of the All Machine/User Assignments or All Group Assignments categories on the left. Mark the check boxes next to one or more items, and then click this button to change the item(s) assignments. This button is useful, for example, when you want to do something like change all assignments for a retiring user to a new hire, or make a new department responsible for software that was previously assigned to another department.
- **Search**—Click to [search](#) for assignment information. The toolbar expands to include a line where you enter your search criteria.
- **Refresh**—Click to refresh the contents of the right pane.
- **Export to Excel**—Click to export the contents of the right pane to an Excel spreadsheet. You'll be prompted to open the results or save them to a file in the path you choose.

Left Pane

The left pane includes the following categories for specific tasks:

- **Information**—Provides an overview of how line item assignments work.
- **Summary**—Includes a basic list, with subcategories for hardware and software line items. You can expand the rows to show the corresponding line items that make up that row.
- **Not Assigned Summary**—Lists any line items not currently assigned, with subcategories for hardware and software line items. Click an item to change its assignments.
- **Overassigned Summary**—Lists any line items that you've assigned to too many users or machines, with subcategories for hardware and software line items. Click an item to change its assignments.
- **All Machine/User Assignments**—Lists all current line item assignments, with subcategories for to-machine and to-user assignments. You can edit individual assignments here, or make bulk reassignments in the subcategories by selecting multiple items and then clicking the Reassign selected items button.

- **All Group Assignments**—Lists all current line item group assignments, with subcategories for items assigned to asset group, machine group, or user group. You can edit individual assignments here, or make bulk group assignments in the subcategories by selecting multiple items and then clicking the Reassign selected items button. Not all links are available for some items. The Reassign selected items button is not available for reconciled software items and thus you cannot "bulk reassign" reconciled software.
- **All Serial Numbers**—In the Assigned to Machine/User category, lists all assignment records that have serial numbers and are assigned. The Not Assigned to Machine/User category lists all assignment records that have serial numbers and are not assigned.

Right Pane

The right pane updates with your selection in the left pane, showing the records that pertain to your selection on the left, as described above.

Related information

[Purch_Common_tasks_in_the_Assign_panel.xml#concept420](#)

Common Tasks in the Assign Panel

Besides viewing how line items are assigned to specific machines or users, or assigned to groups (for example, a specific department) in the Assign panel, you can also do the following:

- [How to Assign Line Items](#)

Edit Assignments Dialog Box (for Computers)

Use this dialog box to add or edit assignments for a computer line item, and to reconcile it to an inventoried machine. The basic procedure for each task is as follows:

- To assign the current purchase to a user, select User in the **Assign to** list, and then specify the name of the user. You can either type the name of the user or [search](#) for it.
- To edit the current machine's group assignment, type a machine group name in the **Group** box or search for one.
- To reconcile the purchase to a machine that was found during CAM Administrator's inventory process, make sure the value in the Quantity box is set to 1, and then click the icon next to the **Reconcile to** box to find the machine. If you enter a serial number for the line item, it will be reconciled to an inventoried machine if a corresponding serial number is identified. Mark the check box if you don't want reminders about reconciling this machine to appear in the Status panel.

Click **Save** when you are finished, or click **Cancel** to return to the previous panel to start over. Click **Close** when you're done making assignments.

Tips:

- If the line item includes more than one computer, you can assign them to a group one at a time. For each computer, enter 1 in the Quantity field, and then enter the serial number or assignment. When you have finished with the first computer, you can click **Add Assignment** or **Add Multiple Assignments** to add additional computers.
- If you don't plan on tracking individual serial numbers and reconciling them to machines through the Cherwell Asset Management inventory process, you can assign multiple computers by entering the total line item quantity, and then choosing your assignment.
- There may be situations where the line item includes multiple items and you want to assign each of them by serial number to the same user or group. In these cases, enter the total quantity in the Quantity box, assign the items, click **Save**, and then click the **Expand** link associated with the assignment. Doing so expands the single assignment to multiple rows and replicates the assignment information.

Related information

[Purch_Assign_Allocate_tab.xml#concept3777](#)

[Purch_How_does_the_allocation_process_work_.xml#concept1895](#)

Edit Assignments Dialog Box (for Non-computers)

Use this dialog box to add or edit assignments for the following types of line item, and to reconcile them:

- Non-computer hardware line items—You can assign to user or machines, and to asset groups.
- Software line items—Your assignment choices depend on the license type of the line item.

To assign non-computer hardware line items:

- To assign the current item to a machine, select Machine in the **Assign to** list, and then specify the machine name. You can either type the name of the machine or [search](#) for it.
- To assign the current item to a user, select User in the **Assign to** list, and then specify the user name. You can either type in the name of the user or search for it.
- To edit the current item's group assignment, type a group name in the Group box or click the magnifying glass button to search for one.

Click **Save** when you are finished, or click **Cancel** to return to the previous panel to start over. Click **Close** when you're done making assignments.

To assign software line items:

- Follow the same process as described above, noting that your options vary depending on the license type.
- If you're assigning a Microsoft SQL Server line item, you'll see an additional option: **This is a passive SQL Server**. Passive SQL Server machines, including virtual machine hosts and guests, are not included in License Analytics calculations.

Tips:

- If the line item includes more than one item, you can assign them to a group one at a time. For each item, enter 1 in the Quantity field, and then enter the serial number, or assignment. When you have finished with the first line item, you can click **Add Assignment** or **Add Multiple Assignments** to add additional line items.
- There may be situations where the line item includes multiple items and you want to assign each of them by serial number to the same user or group. In these cases, enter the total quantity in the Quantity box, assign the items, click **Save**, and then click the **Expand** link associated with the assignment. Doing so expands the single assignment to multiple rows and replicates the assignment information.

Related information

[Purch_Assign_Allocate_tab.xml#concept3777](#)

[Purch_How_does_the_allocation_process_work_.xml#concept1895](#)

How Does the Assignment Process Work?

Assignment is the process of associating a hardware or software asset with an individual, a group, or both.

- Assignment to an individual (whether a machine or a person) usually indicates physical custody or responsibility. Individual assignment usually answers the question, “Where can I find this?”
- Assignment to a group usually indicates financial responsibility. Group assignment usually answers the question, “Who has budget responsibility for this?”

For items that are reconciled, Purchasing makes an entry in the appropriate machine, user, or other asset group for the item you assign to a group. For example, if you assign a machine to the accounting machine group, Purchasing will add the machine to that group if it is not already part of that group. It also adds other assets to other asset groups, and adds user-based software licenses to user groups, and machine-based software licenses to machine groups.

For items that are not yet reconciled, Purchasing will “remember” your assignment request. At the time that the software, computer, or other asset is actually reconciled, Purchasing adds the software licenses or hardware to the requested groups on your behalf.

While Purchasing will add resources to groups, it will not remove them later if, for example, they are deleted or returned from a lease. This behavior is deliberate. CAM Administrator is the primary interface used to manage group assignments, and Purchasing cannot keep track of changes to group assignments it may have made initially.

Reconcile Panel

Use the Reconcile panel to edit, reconcile, and view both reconciled and unreconciled line items.

When creating an order and associated line items, you can also reconcile software line items to software license units, computer line items to inventoried computers, and other hardware line items to other assets.

How to Use the Reconcile Panel

When you click an item in the left pane, the right pane updates to show relevant information. You can view and modify reconciliation information in the right pane.

- Select **Information** for information on the components in this panel and how to use them.
- The **Reconciled** area shows reconciliation information; click a category to see a list of reconciled items.
 - To change how an item is reconciled, click its **Reconcile** link. In the screen that opens, if you selected a software line item, you have the option to change the license unit to which it is reconciled, and the license type.
 - You can also unreconcile it, or specify that you don't care about reconciling this line item (see [To Remove Reconciliation Reminders](#) below). You can also edit the associated order by clicking its order number link.
- The **Unreconciled** area has several categories; click any one of them to see a list of reconciled items.
 - Click **Reconcile** next to any item to reconcile it. If you see line items that don't need to be reconciled or for which you don't want reminders, click **Move Selected Items to Don't Care**.
 - You can edit a line item's associated order by clicking its order number link.
- The **Don't Care** area lists items that you don't want to reconcile and for which you won't receive reconciliation reminders.
 - Click **Reconcile** next to any item to reconcile it.
 - To receive reminders, see [To Receive Reconciliation Reminders](#) below.

To Receive Reconciliation Reminders

1. Select one of the **Don't Care** categories on the left.
2. Select the check boxes next to one or more items.
3. Select **Move selected items from Don't Care** to move the items to the appropriate **Unreconciled** category. You will receive reconciliation reminders for these item(s) until you reconcile them.

To Remove Reconciliation Reminders

1. Select one of the **Unreconciled** categories on the left.
2. Select the check boxes next to one or more items.

3. Select **Move selected items to Don't Care** to move the items to the appropriate **Don't Care** category.

To Export Reconciliation Information to Excel

1. Click **Export to Excel** to export reconciliation information.
2. Choose whether to open the results or save them to a specified location.

Overview: Reconciliation

When creating an order and associated line items, you can also reconcile software line items to software license units, computer line items to inventoried computers, and other hardware line items to other assets. You can also reconcile line items at any time after you've added them, using the Reconcile panel.

Software Reconciliation

When entering a software line item, you can reconcile that software item to a license unit that was automatically created by the software inventory process. For example, as you enter a purchase for five copies of VMWARE 9.5, you can reconcile these licenses to the license unit called "VMWARE Workstation".

Computer Reconciliation

Computer reconciliation is accomplished by matching the serial number you entered for the computer when entering it as a line item in an order to the serial number of the computer discovered during a hardware inventory. For example, say you order a new computer. When you receive the computer, you enter the serial number in the purchasing record's assignment. When the computer is deployed to a user, Cherwell Asset Management finds it during the inventory process. You can then reconcile the computer to the purchase order based on the serial number.

Other Hardware Reconciliation

When creating a purchasing record for hardware assets other than computers (such as routers, switches, and so on), you reconcile them in the assignment. You can reconcile them by serial number to devices entered in CAM Administrator's Other Assets panel.

Common Tasks in the Reconcile Panel

The following are common tasks you're likely to perform in the Reconcile panel. Click any listed item for step-by-step instructions.

- [How to Reconcile Line Items](#)
- [How to Specify that Line Items Not Be Reconciled](#)

Contracts Panel

Use this panel to create, edit, and view contracts that help your organization remain compliant with license agreements based on the agreements' referenced [product use rights](#), or PURs.

Layout of the Contracts panel

The layout of the Contracts panel includes a list of categories in the left pane and a toolbar at the top right (visible when a category on the left is selected). The right pane, the largest area of the panel, is where you can view and modify contracts. The right pane changes according to whatever you select in the left pane, and Purchasing "remembers" where you were last in your current browser session.

Toolbar

The Contract panel's toolbar includes the following buttons:

- **Add**—Click to add a new contract.
- **Search**—Click to [search](#) for contracts. The toolbar expands to include a line where you enter your search criteria.
- **Refresh**—Click to refresh the contents of the right pane.
- **Export to Excel**—Click to export the contents of the right pane to an Excel spreadsheet. You'll be prompted to open the results or save them to a file in the path you choose.




Left Pane

The left pane includes the following categories for specific tasks:

- **Information**—Provides an overview of contracts and how to use this panel.
- **All Contracts**—Lists all existing contracts.
- **Expiring**—Lists all contracts that already expired or will expire within the number of days specified in the Preferences panel. (The default is 90 days.)
- **By Status**—Lists all contracts that fall into each of these categories: Active and Expired.
- **Migrate Contracts**—Lists any contracts that cover software line items that need to be updated to use core-based licensing. This is relevant for purchases of certain versions and editions of Microsoft Windows Server.
 - Click the **Migrate** hyperlink for any contract(s) listed here to open a window where you can [update those line items](#) for accurate analysis in License Analytics. If you skip this step for any affected line items, those line items are not analyzed in License Analytics and will generate exceptions.
 - Click the **Edit** hyperlink for any contract(s) listed here that you want to view. If the vendor has allowed you to override the terms of your licensing agreement, you can also edit the contract from here.

Right Pane

The right pane updates with your selection in the left pane, showing the contracts that pertain to your selection on the left, as described above. To view contracts, click on the appropriate link in the left panel. From here, you can:

- Click the Search toolbar button to [search for contracts](#) based on a variety of criteria.
- Click the Edit hyperlink to edit a contract.
- Click the  icon to view any notes on this contract.
- Click the  icon to view any documents associated with this contract.
- Click the  hyperlink to view a contract's history.
- Click the View Line Items hyperlink to see what line items are covered under a given contract.
- Click the Delete hyperlink to remove the contract.

Related information

[Purch_Common_tasks_in_the_Contracts_panel.xml#concept692](#)

[Purch_How_to_customize_views_in_the_Orders_and_Line_Items_panels.xml#concept1434](#)

Common Tasks in the Contracts Panel

The following are common tasks you're likely to perform in the Contracts panel. Click any listed item for step-by-step instructions.

- [How to Add a Contract](#)
- [How to Edit a Contract](#)
- [How to Apply a Contract to a Line Item](#)
- [How to Renew a Contract](#)
- [How to View a Contract's History](#)
- [How to View What a Contract Includes](#)
- [How to Delete or Change a Contract/Line Item Association](#)
- [How to Migrate Line Items to Core-based Licensing](#)

Documents Panel

Use this panel to create, edit, and view purchasing documents (files associated with purchasing orders).

Layout of the Documents Panel

The layout of the Documents panel includes a list of categories in the left pane and a toolbar at the top right (visible when a category on the left is selected). The right pane, the largest area of the panel, is where you can view and modify documents. The right pane changes according to whatever you select in the left pane, and Purchasing "remembers" where you were last in your current browser session.

Toolbar

The Document panel's toolbar includes the following buttons:

- **Upload Document**—Click to upload a document. Once uploaded, you can associate (reference) an order with a document.



Tip: Due to browser security issues, it's best to use uploaded documents rather than linked documents.

- **Add Linked Document**—Click to link a document that you can reference in an order. With linked documents, the file itself is not loaded, and its location is static.
- **Search**—Click to [search](#) for documents. The toolbar expands to include a line where you enter your search criteria.
- **Refresh**—Click to refresh the contents of the right pane.
- **Export to Excel**—Click to export the contents of the right pane to an Excel spreadsheet. You'll be prompted to open the results or save them to a file in the path you choose.

Left Pane

The left pane includes the following categories for specific tasks:

- **Information**—Provides an overview of how documents work, including a description of document types and how to upload existing linked documents.
- **All Documents**—Lists all uploaded and linked documents, broken into categories to show which documents are referenced by orders and which are not.

Right Pane

The right pane updates with your selection in the left pane, showing the records that pertain to your selection on the left, as described above. Use the Edit hyperlink to edit a document's description, its path (for linked documents only), the Reference hyperlink to change which orders or contracts reference the document, and the Delete hyperlink to remove the document.

Related information

[Purch_Common_tasks_in_the_Documents_panel.xml#concept519](#)

Common Tasks in the Documents Panel

The following are common tasks you're likely to perform in the Documents panel. Click any listed item for step-by-step instructions.

- [How to Add a Link to a Purchasing Document](#)
- [How to Edit an Order or Contract to Include a Document](#)
- [How to Search for Orders or Contracts Related to a Document](#)
- [How to Upload a Document](#)

Preferences Panel

You can set your preferences for contract options, contract types, custom fields, hardware types, manufacturers and vendors, nicknames, reminders, and status types.

To access the Preferences panel:

1. From within CAM, select **View Purchasing** from the toolbar (or select **View Purchasing** from the Purchasing menu).
2. Once in the Purchasing web application, select **Preferences**.
3. Click an item on the left to view and edit your current options in each category.

Layout of the Preferences Panel

The layout of the Preferences panel includes a list of categories in the left pane and a toolbar at the top right (visible when a category on the left is selected). The right pane, the largest area of the panel, is where you can view and modify items in each category. The right pane changes according to whatever you select in the left pane, and the Purchasing "remembers" where you were last in your current browser session.

Toolbar

The Preferences panel's toolbar includes the following button:

- **Refresh:** Click to refresh the contents of the right pane.

Depending on your selection in the left pane, the toolbar may include an additional button to help you perform tasks relevant to that category, or when the Manufacturer/Vendor category is selected, a [Search](#) button.

Left Pane

The left pane includes the following categories for specific tasks:

- **Information:** Provides an overview of this panel.
- **Contract Options:** Specifies what licensing channel to use when channel information is not available for an installation even after inventory runs and virtual machines are discovered. By default, the channel from the contract that is associated with the machine is used (the first option), but you can use the second option to select another channel if the machine is not associated with a contract.
 - Click **Save** after making your selection.
- **Contract Types:** Lists all existing contract types. Click Add Contract Type to add a new contract type that you will be able to select when adding line items. Hardware, Lease, Master, and Software are the default contract types. You can also edit or delete contract types here.

- **Custom Fields:** Lists all custom fields you've created, with subcategories for Contract, Line Item, or Order fields. Any custom fields you create will become part of the screen that you complete when you enter information for an item in that category. You can add, edit, or delete custom fields here.
- **Hardware Types:** Lists all existing hardware types.
 - Click **Add Hardware Type** to add a new hardware type that you can then select when adding a hardware line item. You can also edit or delete hardware types here.
- **Manufacturers/Vendors:** Lists all manufacturers/vendors (not their nicknames, but their actual names as found in the CAM Database).
 - Click **Add Manufacturer/Vendor** to create a new name that you can select when adding or editing an order (vendor) or line item (manufacturer), or click **Search** to search for a particular manufacturer or vendor. You can also edit manufacturer/vendor names here, but you can't delete them.
- **Nicknames:** Lists all shortened or alternate versions of a manufacturer/vendor or software name you've created to help streamline the manufacturer/vendor and software line item reconciliation process. You can add, edit, or delete nicknames here.
- **Reminders:** Specifies when to show reminders on the Status panel and used to set up reminder email alerts for certain events. To change when these reminders are generated, enter a new value in the appropriate box. Enter one or more email addresses if you want email generated for any event; you can also edit the content of the message that is sent.



Note: If access profiles are enabled, the **Send email alerts to** box is not visible. This is because alerts recipients are specified in the access profile itself. If you didn't set up email alerts recipients when you created the access profile or you want to check who is specified to receive the alerts, go to the Administration panel and click **Access Profiles** on the left. From there, you can view, edit, and add access profile settings.

- **Status Types:** Lists all existing status types.
 - Click **Add Status Type** to add a new type that you will be able to select when adding a hardware, software, or software upgrade line item. You can also edit or delete status types here.

Right Pane

The right pane updates with your selection in the left pane, showing the records that pertain to your selection on the left, as described above.

Related information

[Purch_Common_tasks_in_the_Preferences_panel.xml#concept561](#)

Common Tasks in the Preferences Panel

The following are common tasks you're likely to perform in the Preferences panel. Click any listed item for step-by-step instructions.

- [How to Add a Contract Type](#)
- [How to Add a Manufacturer or Vendor](#)
- [How to Create a Nickname](#)
- How to create custom [contract](#), [line item](#), or [order](#) fields
- [How to Set Up Reminder Email Alerts](#)

Contract Options

Contract options are available in the Preferences panel. When you click Contract Options in the left pane, the right pane updates to show you the contract options you can choose. Specifying these contract options may be necessary for sites that also use License Analytics, because **that component requires knowledge of the channel under which an analyzed installation was purchased**. Sometimes an analyzed installation does not provide channel information even after the inventory and virtual environment discovery processes are run, and the options you specify here dictate how channel information is determined in these situations.





You have these options:

- Use the channel from the contract that is associated with the machine: Machines and contracts are associated with each other via machine groups. If an Enterprise Agreement exists, it applies to all machines and its channel will be used. This is the default option.
- Use <x> channel if the machine is not associated with a contract: Select this option if you want to specify that the OEM, Retail, or Volume channel is used.

After you make your selection, click Save.



Administration Panel

This topic includes sections that are noted as only relevant in certain configurations:

 Hosted installations;  On-premises installations;  CSM authentication;  CAM authentication

Use the Administration panel to set up and manage access profiles. You can use access profiles to make orders and contracts accessible to certain users or groups, and you can apply different access profiles to different orders and contracts to control who can view and edit them.

Who Can View the Administration Panel?

-  The Administration panel is only visible if [Purchasing user policies](#) are enabled and the user is a full administrator or a Purchasing administrator.
-  The Administration panel is only visible if the user belongs to a CSM security group with rights to administer Purchasing. If you plan to use CSM authentication, see [How to Set Up CSM Security Groups, Teams, and Users](#) for procedures to complete in Cherwell Service Management before proceeding.

Layout of the Administration Panel

This panel contains these sections:

- A list of categories in the left pane
- A toolbar at the top of the right pane
- A right pane that changes according to your selection in the left pane and "remembers" where you were last in your browser session

This topic describes each part of the panel based on your selection in the left pane.

When Information Is Selected in the Left Pane

You won't see a toolbar in the right pane. The right pane provides an overview of how access profiles work.

When Access Profiles Is Selected in the Left Pane

A toolbar and list of access profiles are shown in the right pane.

Access Profiles Toolbar

When Access Profiles is selected, these buttons are available:

-  **Add Access Profile:** Click to create a new access profile.

- **Refresh:** Click to refresh the contents of the right pane.


Although it's not a toolbar button, a "click here" hyperlink is shown above the list of access profiles. Clicking it launches the process for synchronizing CSM user and team data for use with Purchasing.

Access Profiles Right Pane

■ The right pane shows a list of current access profiles. You can add, edit, and delete access profiles here.

■ The right pane shows a list of current access profiles and CSM teams. You can edit access profiles here, but only to include email addresses to send reminder email alerts for orders related to this access profile. To create or delete access profiles, or to modify the list of access profile users, use the CSM teams feature in Cherwell Service Management.

The following columns are shown:

- An untitled column that includes Edit hyperlinks for each listed access profile.
- **Name** of the ■ access profile or ■ CSM team.
- **Description**, if provided. The default access profile's description is either ■ Universal CAM profile or ■ Universal CSM profile.
- **References:** The number of orders and contracts where the access profile is applied.
- **Type:** Where the access profile was created:
 - ■ "CAM" indicates that it was created within Purchasing.
 - ■ "CSM" indicates that it was created within Cherwell Service Management as a CSM user team.
- : Whether email addresses are set up for this access profile so alerts are sent when your maintenance, lease items, or contracts are due for renewal, and for lease buyout notifications. You can set up email reminder alerts in the Preferences panel, or here in the Administration panel by clicking an access profile's Edit hyperlink.

■ Since access profiles are always enabled with CSM authentication, you need to configure email addresses here in the Administration panel by selecting the access profile and editing it.

- **Authorized Users:** Information on users authorized for that access profile:
 - ■ User names of authorized users.
 - ■ Since you add, edit, and delete users in Cherwell Service Management, this column reads "Managed by CSM."
- ■ An untitled column that includes Delete hyperlinks for each listed access profile.

You can click a column name to sort items within it.

When Migrate Access Profiles Is Selected in the Left Pane

This item is available only when you have existing access profiles that are not valid for your current authentication method, and it provides a means for [migrating those access profiles](#) to the current method so that you can apply them to orders and contracts.

When shown, this section includes a toolbar and list of access profiles in the right pane.

Migrate Access Profiles Toolbar

When Access Profiles is selected, this button is available:

- **Refresh:** Click to refresh the contents of the right pane.










Tip: Click this button to refresh the list of access profiles that need migrating if you closed the Synchronize Access Profiles with CSM teams dialog box before the synchronization process finished.

Although it's not a toolbar button, a "click here" hyperlink is shown above the list of access profiles. Clicking it launches the process for synchronizing CSM user and team data for use with Purchasing.

Migrate Access Profiles Right Pane

This section lists any access profiles that are not valid for your current authentication method and similar information is shown as for access profiles, above:

- An untitled column that includes Migrate hyperlinks for each listed access profile.
- **Name** of the  access profile or  deleted CSM team.
- **Description**, if provided.
- **References:** The number of orders and contracts where the access profile is applied.
- **Type:** Where the access profile was created:
 -  "CAM" indicates that it was created within Purchasing.
 -  "CSM" indicates that it was created within Cherwell Service Management as a CSM user team.
- : Whether email addresses are set up for this access profile.
- **Authorized Users:** Information on users authorized for that access profile:
 -  User names of authorized users.
 -  Since you add, edit, and delete users in this column reads **Managed by CSM**.

You can click a column name to sort items within it.

When Order Administration Is Selected in the Left Pane

A toolbar and a list of all orders that have the selected (in the list box at the top) access profiles applied to them are shown in the right pane.

Order Administration Toolbar




When Order Administration is selected, these buttons are available:

- **Show orders with Access Profile <(Select)>**: Click to see a list of all orders that have the selected access profiles applied to them.
- **Change selected orders**: Click to change which access profiles are applied to selected orders.
- **Refresh**: Click to refresh the contents of the right pane.

Order Administration Right Pane

This section shows the orders that have the selected access profile list applied to them.

You can do the following here:

- [Change which access profiles are applied to one or more orders.](#)
- Click a column name to sort items within it.
- Click the  icon to view any notes on this order.
- Click the  icon to view any documents associated with this order.
- Click the  hyperlink to view an order's history.

When Contract Administration Is Selected in the Left Pane

A toolbar and a list of all contracts that have the access profiles selected in the list box at the top applied to them are shown in the right pane.

Contract Administration Toolbar




When Contract Administration is selected, these buttons are available:

- **Show contracts with Access Profile <(Select)>**: Click to see a list of all [contracts](#) that have the selected access profiles applied to them.
- **Change selected contracts**: Click to change which access profiles are applied to selected contracts.
- **Refresh**: Click to refresh the contents of the right pane.

Contract Administration Right Pane

This section shows the orders that have the selected access profile list applied to them.

You can do the following here:





- [Change which access profiles are applied to one or more contracts.](#)
- Click a column name to sort items within it.
- Click the  icon to view any notes on this contract.
- Click the  icon to view any documents associated with this contract.
- Click the  hyperlink to view a contract's history.

Related information




[Purch_Common_tasks_in_the_Administration_panel.xml#concept1648](#)

Common Tasks in the Administration Panel

This topic includes sections that are noted as only relevant in certain configurations:

 Hosted installations;  On-premises installations;  CSM authentication;  CAM authentication

The following are common tasks you're likely to perform in the [Administration panel](#). Click any listed item for step-by-step instructions.

-  [How to Add an Access Profile](#)
-  [How to Add Authorized Users to an Access Profile](#)
- [How to Change Which Access Profile Is Applied to One or More Contracts](#)
- [How to Change Which Access Profile Is Applied to One or More Orders](#)
-  [How to Delete an Access Profile](#)
- [How to Edit an Access Profile](#)
- [How to Migrate Access Profiles](#)

Authorized Users for <access-profile-name> Dialog Box

This topic applies to: CAM authentication

The top portion of this box lists all users and user groups included in the selected [access profile](#).

To remove a user or group from the access profile, click the Remove hyperlink next to the user or group.

You can use the lower portion of the box to add authorized users and groups. First, [search](#) for a user or user group by name (you can use [wildcards](#)), and then click User or Group. The box expands to show all users or groups that meet the search criteria. Click the Select link next to anyone you want to add to this profile, and the top portion of the box is updated. Click Save once you are satisfied with the list of users and groups for this access profile to return to the Access Profile Details box, and click Save again to save the access profile.

Definitions and Overviews

Access Profiles

An access profile is a tool you can use to control who has access to orders and contracts.

CAM Authentication only: When [Purchasing user profiles](#) are enabled in CAM Administrator, you can use access profiles in Purchasing, provided you are logged in as a full administrator or Purchasing administrator.

CSM Authentication only: If your site uses CSM authentication, you don't use CAM Administrator's user policies feature. Instead, [you set up CSM security groups, teams, and users](#) for use with Cherwell Asset Management, and the CSM teams you create show up in the Administration panel as access profiles.

You can use access profiles to make orders and contracts accessible to certain users or groups, and you can apply different access profiles to different orders and contracts to control who can view and edit them.

For example, you may want to specify that specific users in one department have access only to orders placed for that department, while allowing a specific user or group access to all orders companywide.

"All users" Access Profile

The "All users" access profile is a system-defined access profile that includes all users. It is applied to all orders and contracts not otherwise associated with an access profile. Do not add users to the "All users" access profile.

Notes:

- You cannot delete the All users access profiles, nor can you change their names or descriptions.
- **CAM Authentication only:** Access profile membership persists for the length of the user's Purchasing session. This means that if you, the administrator, add or delete authorized users from an access profile while affected users are logged into Purchasing, those changes won't take effect until the next time the users log in.
- We recommend testing that access profile membership is set up as you intend before you actually allow authorized users to log in. To do this, log in as a sample user using the appropriate credentials. If you want to test access profile membership for different users simultaneously, be sure to use a different browser for each user. For example, use Internet Explorer to log in as UserA and Chrome to log in as UserB.

Migrating Access Profiles

This topic applies to: CSM authentication

There are two situations in which you must migrate any existing access profiles so you can apply them to orders and contracts:

1. You change from CAM authentication to CSM authentication or vice versa. Even if you didn't use user policies to control access to Purchasing, access profiles are always enabled with CSM authentication, so you must select an access profile to apply to each order and contract as you add them.

Once you migrate existing CAM access profiles to CSM access profiles (CSM user teams), any orders and contracts that reference the CAM access profile are updated to reference the CSM user team you selected during the migration process.

2. A CSM user team that is applied to orders or contracts is deleted. You need to specify which CSM user team to apply to those orders and contracts.

A **Migrate Access Profiles** task appears on the Status panel, and there is an additional **Migrate Access Profiles** section in the Administration panel.

Related information

[../cam_administrator/admin_csm_authentication/Purch_How_to_migrate_access_profiles.xml#concept2482](http://cam_administrator/admin_csm_authentication/Purch_How_to_migrate_access_profiles.xml#concept2482)

Available License Types

License types include concurrent, freeware, per core, per processor, per seat, per seat with usage, per server, shareware, per user, site, unmanaged (license type not defined).

License Types and Purchasing

License Types

A license unit can be assigned a license type. License types fall into two broad categories:

- Machine-based licenses are those that grant the right to install or run some software on some number of computers. Depending on the license type, the machines can include some named workstations, servers, all machines at a site, or all machines in some organizational group.
- User-based licenses grant the right to use software to a named set of individuals, or all individuals in a particular organizational group. The only user-based license is "Per user."

Cherwell Asset Management also includes an "Unmanaged" license type, which is assumed to be machine-based, but is otherwise undefined.

License types are not used by License Analytics.

License Assignments

A software license can be assigned to an individual, a group, or both.

Licenses are assigned to *individuals* primarily for the purpose of recording where the software is installed or who its primary user is.

Cherwell Asset Management defines two different kinds of individuals to which licenses can be assigned:

- **Machine**—A computer of any kind (server, desktop, or laptop)
- **User**—An individual person

Licenses are assigned to *groups* primarily for the purpose of accounting for expenses.

Cherwell Asset Management defines two different kinds of groups to which licenses can be assigned:

- **Machine** groups contain computers.
- **User** groups contain users.

While any kind of license can be assigned to any kind of individual, the license type is used to determine what kind of group to which licenses can be assigned. Machine-based licenses can be assigned only to machine groups, and user-based licenses can be assigned only to user groups.

The kinds of assignment groups determine license type "compatibility." Since all machine-based licenses are assigned to machine groups, these licenses are considered "assignment-compatible." A license unit or line item can be changed from one kind of machine-based license to another without making any changes in the kinds of groups to which the licenses are assigned.

For the purposes of determining "assignment-compatibility," unmanaged licenses are considered to be compatible with machine-based licenses.

Software Line Items

When you enter information about software purchases into Purchasing, you will ordinarily enter the purchase details using a software line item. As mentioned elsewhere, a purchase or lease can contain many different kinds of things, each of which is entered as a line item.

Software line items contain information about the software title, the publisher, number of licenses purchased, per-license (unit) price, and so forth. Software line items also allow you to specify the license type that was purchased.

When you enter a software line item, you can also provide information on how you would like the licenses to be assigned, either to machine- or user-groups, based on the license type. Once the line item is reconciled to a license unit, these provisional assignments are grouped with the other assignments for that license unit.

Reconciling Software Line Items and License Units

License units usually represent installed software that Cherwell Asset Management discovered in your environment. Reconciliation is the process of associating a software line item (something you bought) with a license unit (something that is installed).

Reconciliation is entirely optional, but provides several benefits:

- The quantities entered in Purchasing are automatically added to those reported on for the purposes of compliance.
- The number of licenses available for assignment is automatically adjusted based on the number purchased.
- The most recent price paid is assigned as the "value" for all licenses purchased.

Conversely, if one or more software items is "unreconciled" from license units, any licenses added are, instead, subtracted from the totals available for compliance and assignment.

License Types and Reconciliation

When a software line item and a license unit are reconciled, they must both have the same license type. Purchasing makes certain assumptions about how the final license type will be determined:

- If both the line item and the license unit already have the same license type (for example, "Per user" or "Per server"), no license type change is required.
- If the license unit license type is not "Unmanaged," and the line item license type is "Unmanaged," the line item's license type is changed to match the license unit. (But see the Note at the end of this list.)
- If the license unit's license type is "Unmanaged," and the line item is not "Unmanaged," the license unit's license type is changed to match the line item.



Note: A software line item's license type is not changed from "Unmanaged" to "Per user" if the line item has any group assignments. Doing so would require deleting the group assignments.

Manual Reconciliation

When editing a software line item, you can search for a license unit to reconcile with the line item. Once you make a selection from the list of available license units, Purchasing provides information on any changes that must be made to allow the reconciliation to proceed. You can also choose to change the line item license type in a way that will require you to delete your license group assignments.

Automatic Reconciliation

In certain cases, Purchasing automatically reconciles one or more software line items with a license unit. This will occur only when both of the following are true:

- The line item name exactly matches either a license unit name or a software nickname.
- The line item license type and license unit license type are either equal, or when either the license unit or line item license type is "Unmanaged," and changing the license type will not cause any group assignments to be lost because of changes in assignment type.

Cascading License Type Changes During Line Item Reconciliation

When a line item and license unit are reconciled, Purchasing makes sure that both of them have the same license type. This can sometimes produce unexpected side effects. Consider the following example:

1. A number of line items, with a license type of "Unmanaged," are reconciled with a license unit (let's call it "L") whose license type is also "Unmanaged."
2. You enter a new purchase that contains a software line item with a license type of "Per seat," and choose to reconcile with license unit "L" while using Purchasing to edit the line item.
3. Purchasing changes the license type of "L" to "Per seat."
4. Purchasing changes the license types of all of the line items reconciled with "L" to "Per seat" as well.

In this case, the rule to remember is that if you don't assign a license type other than "Unmanaged," the first time you choose a different license type, all related line items will be changed to match.

Notice that this change will occur automatically only when the license types are "Unmanaged." If you were then to change the license type of a line item reconciled with "L" to something else, Purchasing would tell you that doing so will unreconcile the line item.

Cascading License Type Changes When Changing License Unit License Type

Changing the license type of a license unit using CAM Administrator can also affect reconciliation. There are three possible outcomes:

- If you change the license type of an "Unmanaged" license unit that is reconciled to a number of line items to a machine-based license type, the line item license types will be changed to match the license unit.
- If you change the license type of an "Unmanaged" license unit that is reconciled to a number of line items to a user-based license type, the license types of those line items without group assignments will be changed to match the line item. Line items with group assignments will become unreconciled.

- If you change the license type of a license unit that has a license type that is not "Unmanaged," any line items reconciled with the license unit will be automatically unreconciled.

If reconciled line items become unreconciled, you will notice that the license unit license counts will change, because the (previously reconciled) line item license quantities are subtracted from the number of available licenses. If you want to re-reconcile those line items to restore the license counts, you must use Purchasing to first find all of the affected line items, and then edit each one and reconcile it to the license unit. In each case, when doing the reconciliation, Purchasing will inform you that it will change the line item license type to match the license unit.

Contracts

Purchasing lets you use contracts to ensure compliance with the [product use rights](#) associated with your license agreements with manufacturers/vendors. You can use [contract templates](#) as is, customize them, or create new contracts from scratch.

For Purchasing purposes, a contract includes this information: who the contract is with, any associated documentation, the contract start and end date, and the type of contract.

Contract Templates

Purchasing provides the following templates for creating new contracts. Select the one best suited for your [product use rights](#), and then you can complete the fields in the contract as needed:

- **Microsoft Enterprise Agreement**—When you add this type of contract, you have the option to specify that all OEM software is covered by this contract. These contracts are generally intended for midsize to large businesses.
- **Microsoft non-Enterprise volume contracts**—With these contracts, you can specify whether software assurance (a Microsoft maintenance program) is included with the software, and whether all OEM software is covered by it. These contracts are generally intended for midsize to large businesses. You apply this contract to groups of machines; the Groups field is required. Templates in this category include: Microsoft Open License, Microsoft Open Value, Microsoft Open Value Subscription, Microsoft Open Value Subscription for Government, Microsoft Product and Services Agreement, Microsoft Select Agreement, and Microsoft Select Plus Agreement.
- **MSDN Agreement**—These contracts cover MSDN subscriptions on a per-user basis.
- **Other Contract**—A generic template used for non-Microsoft agreements.

Custom Fields

Before you start entering purchasing information, you may want to create custom fields you can use when entering information. You can also use custom fields to hold order or line item data that you are importing from a spreadsheet.

You can set it up so that these fields are required or optional when someone adds information.

You can create the following types of custom fields. Click any bolded item for step-by-step instructions:

- **Contract**—Any custom fields of this type that you create are available when you add or edit a contract.
- **Line Item**—Any custom fields of this type that you create are available when you add a line item to an order.
- **Order**—Any custom fields of this type that you create are available when you enter an order.

Once you've created custom fields, you can complete them as you add contracts, line items, and orders.

Hardware Types

Purchasing classifies hardware into two types: computers and other assets.

Computers

Computers are managed desktop or server machines. Purchasing treats computers differently than other types of hardware assets (described next). In CAM Administrator, you can run the discovery process to discover all computers, also known as machines, in your organization's Active Directory. These machines appear in CAM Administrator's Machines panel and you can inventory or meter them there.

In Purchasing, when you enter a computer as a line item, you can also enter its serial number, which will cause it to be automatically reconciled when that computer is inventoried.

Other Assets

The other hardware type, other assets, covers all other types of hardware. Other assets can include switches, routers, firewalls, and so on. Since they are not discovered or inventoried in CAM Administrator, you have to create them and then reconcile them manually.

Related information

[Purch_How_to_add_a_hardware_type.xml#concept680](#)

Line Items

A line item is a single entry in an order. One order may contain multiple line items. Types of line items include hardware, hardware maintenance, software, software maintenance, and software upgrades.

For example, say you purchased a new CPU. Your purchase order for this item could include the following line items: the CPU itself, a monitor, software, and hardware and software maintenance.

Nicknames

Purchasing uses the term "nicknames" to refer to shortened or alternate versions of a software or manufacturer/vendor name.

Software nicknames map application names to license units in the CAM Database.

Manufacturer/Vendors nicknames allow you to normalize manufacturers/vendors entered in the purchasing interface to manufacturers/vendors represented in the CAM Database.

Nicknames generally come into use when you import purchasing data from a spreadsheet or when you manually enter an order or line item and use a name other than the official name for a given entity.

For example, say you entered a purchase order that included some software from Microsoft. When you entered the line item, you typed "MS OFF STD 2007" instead of spelling out each word. But when the inventory process in CAM Administrator next ran, it found a license unit for the same application and version, but with the official name. You could use a nickname to associate "MS OFF STD 2007" with "Microsoft Office 2007 Standard".

To "map" nicknames to the official names that are used in the CAM Database, use the options in the Preferences panel. You can create and edit nicknames there, as well as delete existing, unused nicknames.

Orders

An order is a collection of information about a purchase or lease. In Purchasing, an order includes information about the purchase (such as order date, order number, price, and so on), as well as the line items that make up the purchase. A single order can include multiple line items.

For example, say you purchased a new CPU. Your purchase order for this item could include the following line items: the CPU itself, a monitor, software, and hardware and software maintenance.

Product Use Rights in Purchasing

Product use rights (PURs) are the specified terms and conditions that apply to your use of a product. Manufacturers like Microsoft reference PUR documents as part of licensing agreements to explain to customers their options for using a given product.

In Purchasing, you can associate contracts with line items to ensure compliance with supported PURs.

Purchasing User Policies

This topic applies to: CAM authentication

Purchasing user policies lets you set up [access profiles](#) to make orders and contracts accessible to certain users or groups, and you can apply different access profiles to different orders or contracts to control who can view and edit them. To use this feature, you need to enable it in the Purchasing User Policies dialog box in CAM Administrator (it is disabled by default). Be aware that the first user who enables Purchasing user policies becomes the Purchasing administrator, with Purchasing administrator privileges.



Note: If your site uses CSM authentication, you don't use CAM Administrator's user policies feature. Instead, you [set up CSM security groups, teams, and users](#), and the CSM teams you create show up in the Administration panel as access profiles.

Upgrading Customers

If you upgraded your CAM Database and Purchasing from an earlier version in which you used Administrator user policies to grant access to Purchasing, Purchasing user policies are already enabled for you. All users who had permission to use Purchasing in the earlier version are assigned to the Purchasing Administrator access profile by default. When you view or edit existing orders, you'll see that the Access Profile field is set to Purchasing Administrator. Only full and Purchasing administrators can access these orders. If you prefer to re-assign permissions, you can change the access profile for multiple orders or contracts at once in the Administration panel.

Reminders

Reminders appear on the Status panel when you first log into Purchasing to notify you of any items nearing expiration. The Status panel includes reminders for the following events:

- Leases that are expiring or with buyout notifications
- Contracts that are expiring
- Maintenance agreements that are expiring, broken out by hardware and software

To address any reminder, click its hyperlink to go to the location where you can complete the task. You can change how many days ahead of time you are notified of each event (by default, for example, contracts are shown as expiring 90 days before their end dates) in the Preferences panel. You can also set up email alerts so that you are notified when an item is due for renewal.

SKU Numbers

You can use SKU numbers (if available) to expedite the process of adding line items to an order. When you enter a SKU number, a list of items that exactly match it is shown. (Note that wildcards are not allowed, so you must enter the complete SKU number.) From the list, you can select which item to add, and any available information for this item is entered into the relevant line item fields. If needed, you can edit any of the information as you add the line item, or later, from the Line Items panel.



Tip: The Part Number (SKU) column does not appear in the Line Items panel by default. To add it, see [How to Customize Views in the Orders, Line Items, and Contracts Panels](#).

How to...

Access Profiles

How to Add an Access Profile

To add a new access profile:

1. From the CAM Purchasing console, select **Administration > Access Profiles**.
2. Click **Add Access Profile**.
3. In the **Access Profile Details** box, enter a name and description, then click **Add authorized user**.
4. In the lower portion of the **Authorized Users for <>** dialog box, [search](#) for a user or user group by name (you can use [wildcards](#)), then click **User or Group**.
5. Click **Select** next to the user(s) you want to add to this profile, and the top portion of the box is updated.
6. Click **Save**.
7. **Optional:** Specify where to send reminder email alerts for orders related to this access profile for the following conditions.



Note: Users only receive reminders for orders or contracts they created or are part of their access profile.

- Expiring leases
 - Lease buyout notifications
 - Expiring maintenance agreements
 - Expiring contracts
8. Click **Save**. The new access profile is now shown in the list.

How to Add Authorized Users to an Access Profile

An access profile allows you to control who has access to orders and contracts.

To add authorized users to an access profile:

1. From the CAM Purchasing console, select **Administration > Access Profiles**.
2. Select **Edit** next to the access profile to which you want to add authorized users.
3. Select **Add authorized users**.
4. In the lower portion of the box, [search](#) for the user or user group you want to add. You can use [wildcards](#). The box expands to show all users or groups that meet the search criteria.
5. Click **Select** next to anyone you want to add to this profile, and the top portion of the box is updated.
6. Repeat steps 4-5 to add more users or groups.
7. Click **Save**.
8. Click **Save** again to return to the list of access profiles.

How to Delete an Access Profile

This topic applies to: CAM authentication

To delete an access profile:

1. From the CAM Purchasing console, select **Administration > Access Profiles**.
2. In right pane, find the access profile you want to delete and click **Delete**.

Notes:

- You cannot delete the **Purchasing Administrator** or **All users** access profiles, nor change their names or descriptions.
- If you try to delete an access profile that still has orders or contracts associated with it, you are prompted to update those orders or contracts (associate them with another access profile) before you can delete them.

How to Edit an Access Profile

To edit an existing access profile:

1. From the CAM Purchasing console, select **Administration > Access Profiles**.
2. Click **Edit** next to the access profile you want to change.



Note: You cannot change the names or descriptions of the **Purchasing Administrator** or **All users** access profiles.

3. In the Access Profile Details box that opens, make your edits.
 - **CAM Authentication only:** You can edit any of the options for the selected access profile.
 - **CSM Authentication only:** You can only edit the email addresses used for alerts. All other changes are managed in Cherwell Service Management.
4. Click **Save**.

CAM API Documentation

How to Access the CAM API Documentation

The CAM API is the collection of web services that allows you to interchange data with external systems. For more information, see the [CAM API Documentation](#).

Contracts

How to Add a Contract

To add a contract:

1. From the CAM Purchasing console, select **Contracts > All Contracts..**
2. Click **Add toolbar**.
3. In the list of templates for common contracts that opens, click the template you want to use, or click **Other Contract** if you prefer building a contract yourself instead of using a template.
4. Complete the fields.



Note: The Contract Date, Contract Number, and Start Date fields are required, and most contracts require that you apply them to a machine group. The exceptions are the Microsoft Enterprise Agreement and Other Contract template.

You can change the description of the contract, but if it is one of the templates for Microsoft contracts, you cannot edit the manufacturer name.

5. If [Purchasing user policies](#) are enabled or your site uses [CSM authentication](#), Access Profile is also required. Select one from the list.
6. Complete other optional fields to provide as much information as possible (for example, completing the End Date field will make it easier to track when you need to renew the contract).
7. Click **Save**.
The window updates to show the contract information you just entered, with an additional section below for entering information on what the contract covers. You can close the window now and return to the Contracts panel, or you can do one of the following to specify what the contract includes:
 - Click **Add Purchase** and **Add Lease**, then follow the procedures for [entering orders](#) and [adding line items](#) to them.
 - Click **Browse Existing** to apply existing line items to this contract. Select the line item(s), and then click **Save**.

The contract now appears in the Contracts panel.

How to Add a Contract Type

Contract types help describe contracts. You can add your own contract type, or use the defaults.

To add a contract type from the Preferences panel:

1. From the CAM Purchasing console, select **Preferences**.
2. From the Preferences panel, click **Contract Types**.
3. On the toolbar, select **Add Contract Type**.
4. Enter a name for the new contract type and click **Save**.

To add a contract type when adding a contract:

1. In the Type field, select **New**.
2. Enter a new name, or add one from the Preferences panel.

The new contract type now appears in the list, and you can select it whenever you add or edit a contract.

How to Add a Link to a Purchasing Document

We recommend uploading documents instead of linking to them. If you have existing linked documents you want to convert to uploaded documents, see [Uploading Existing Linked Documents](#) on the Document panel's Information page.

See [How to Upload a Document](#).

To link a document so that you can later associate it with an order or contract:

1. From the CAM Purchasing console, select **Contracts**.
2. In the Documents panel, click **All Documents** in the left pane, and then click **Add Linked Document** in the toolbar.

The right pane shows a Document Details screen, and any existing linked documents are shown at the bottom.

3. Required: Enter a description for the document.
4. Browse to the document.
5. Click **Save**.

The document is listed when you click the All Documents category on the left.

Once you've linked a document, you can:

- Edit its description by clicking **Edit**.
- Associate the document with an order or contract by clicking **Reference**.
- If the document is not referenced by an order or contract, you can delete it by clicking **Delete**.



Note: If an order or contract references a document, you must first delete those references, then delete the document.

How to Apply a Contract to a Line Item

There are multiple ways to specify what line items are covered in a contract. The most efficient methods for each situation are as follows:

- **Existing line item, new contract:** As you create a contract, follow the steps in [How to Add a Contract](#), including the last step of adding order and line item information to the contract.
- **New line item, existing contract:** As you add line items to an order, follow the steps in [How to Add Line Items to an Order](#), including searching for and selecting the contract you want to apply.
- **Existing line item, existing contract:** You can associate existing line items with existing contracts from the Line Items panel or from the Contracts panel:
 - From the Line Items panel:
 - From the CAM Purchasing console, select **Line Items**.
 - Locate the line item and click **Edit**.
 - Search for and select the contract, then click **Save**.
 - From the Contracts panel:
 - From the CAM Purchasing console, select **Contracts**.
 - Locate the contract and click **Edit**.
 - Click the order number that contains the line item.



Tip: If you're not sure which order contains the line item you want, click a likely order number, then click **Browse existing** to open a list of line items the order includes.

- Locate the line item in the list, then click **Edit**.

How to Create Custom Contract Fields

To create a custom contract field:

1. From the CAM Purchasing console, select **Preferences**.
2. In the Preferences panel, click **Contract** under the Custom Fields category in the left pane. The right pane changes to list any existing custom contract fields.
3. Click **Add Custom Contract Field**.
4. Required: In the **Name** box, enter the name for the new field, and provide a description for it in the next box. Both fields are required.
5. Required: In the **Type** box, select what type of field to create.



Note: Note that if you want to create a List type of field, you need to enter list values in the box that opens.

6. Optional: Mark **Required** if you want to require users to complete the field before they can proceed.
7. Click **Save**.

The field you just added now appears in the list, where you can edit or delete it. The custom field will also appear on the screen where you add contracts.

How to Change Which Access Profile Is Applied to One or More Contracts

Access profiles control who has access to orders in Purchasing. You can apply access profiles to specific contracts.

To change which access profile is applied to one or more contracts:

1. From the CAM Purchasing console, select **Administration > Contract Administration**.
2. Select an access profile from the list in the right pane. The pane updates to show all contracts applied to the selected access profile.
3. Check the box(es) next to the contract(s) you want to change, then click **Change selected contracts**.
4. Select another access profile and click **OK**.

Related information

[Purch_Overview_Purchasing_user_policies.xml#concept2017](#)

How to Delete a Contract

Before deleting a contract, we recommend doing the following:

1. From the CAM Purchasing console, select **Contracts**.
2. Go to the contract, then click **View Line Items** in the Contracts panel.
3. Review the line items associated with this contract. You may want to move those line items to another contract or create a new one to cover them.

To delete a contract:

1. From the left pane of the Contracts panel, click **All Contracts**, or click another category to find the contract you want to delete.
2. In the right pane, click **Delete** next to the contract.
3. If the contract covers existing line items, you are warned about deleting the contract and asked to confirm the action. Click **OK** to delete the contract and remove line item references to it, or **Cancel** if you want to go back and look at those line items so you can decide how to proceed. If the contract does not cover any line items, you are simply prompted to confirm your delete.

How to Edit a Contract

To edit an existing contract:

1. From the CAM Purchasing console, select **Contracts > All Contracts**.
2. Click **Edit** next to the contract you want to change.
3. In the box that opens, make your edits.
 - You can also add orders and the line items they include to this contract by clicking **Add Purchase** and **Add Lease**, then following the procedures for entering orders and adding line items to them.
 - Alternately, click **Browse Existing** to apply existing line items to this contract.
 - You can also click **Order Number** to edit the order itself from here.
4. Click **Save**.



Note: You can change the description of the contract, but if it is one of the templates for Microsoft contracts, you cannot edit the manufacturer name.

How to Renew a Contract

Renewing a contract adds new information to the existing contract. By default, entering a new contract end date here replaces the existing contract end date.

To renew an existing contract:

1. If the Renew Contract window is already open, skip to step 3. Otherwise, From the CAM Purchasing console, select **Contracts**.
2. Click **Expiring** in the left pane.
3. From the list that opens on the right, click **Renew** next to the contract you want.
4. In the window that opens below, enter the **Renewal Date** and **Renewal Description**. Both of these fields are required and can help you identify the contract renewal later.
5. In the **Contract End Date** section, note that the previous end date (which is past or nearing expiration) is already completed with the date you entered when you added the contract. In the **New** field, enter the date that the renewed contract expires.
6. When you enter a new contract end date, the **Update contract end date** option becomes available and is checked by default. In most cases, you should leave this box checked; it will replace the previous end date as listed in the Contracts panel.
7. Optional: Enter any additional information you want to add, such as an order number, invoice number, price, and notes.
8. Click **Save**.

The Contracts panel updates with the new contract end date and the contract no longer falls under the Expiring category.



Note: You can also renew a contract in the window that opens when you add or edit a contract. Click **Renew**, enter the new information, and click **OK**.


How to Search for Orders or Contracts Related to a Document

To search for orders that are related to a document or contract:

1. From the CAM Purchasing console, select **Documents**.
2. Find the document in the Documents panel, then click **Reference**.
3. In the Search for box, enter a search term, then click **Search**.
4. Click **Select** next to the order you want to open.

How to View a Contract's History

To view information about the history of a contract:

1. Locate the contract by doing one of the following from the CAM Purchasing console:
 - Select **Contracts > All Contracts**
 - Select **Expiring**
 - Select one of the **By Status** subfolders
2. In the right pane, find your contract and do one of the following:
 - Click the  icon.
 - or -
 - Click **Edit** to open a box that includes all of the available information for this contract. Click **View History** at the top right of the box.

The CAM History report for the contract opens. It shows the history of changes to each contract, including date, user, type, action taken, parameter, description, and old and updated values.

How to View What a Contract Includes

To view what line items are included in a contract:

1. Locate the contract by doing one of the following from the CAM Purchasing console:
 - Select **Contracts > All Contracts**
 - Select **Expiring**
 - Select one of the **By Status** subfolders
2. In the right pane, find the contract and do one of the following:
 - Click **View Line Items**. A box opens that lists all line items included in the contract.



Note: If the contract does not have a View Line Items hyperlink, it doesn't contain any line items. You can add line items to it by clicking **Edit**, then [enter an order](#) and [add line items to the order](#).

- or -

- Click **Edit** to open a box that includes all of the available information for this contract.

Email Alerts

How to Set Up Reminder Email Alerts

To set up email alerts to be notified when your maintenance, lease items, or contracts are due for renewal:

1. From the CAM Purchasing console, select **Preferences**.
2. Click **Reminders**.
3. In the right pane, set up email alerts for each item.
4. Verify or change when you want to be notified of each event (for example, leases expiring in the next 90 days).
5. For each event, specify where to send the email alert. Separate multiple recipients with commas.

If you use CAM Authentication

If access profiles are enabled, the **Send email alerts to** box is not visible, as alerts recipients are specified in the access profile itself. If you didn't set up email alerts recipients when you created the access profile or you want to check who is set up to receive the alerts, go to the Administration panel and click **Access Profiles** on the left. From there, you can view, edit, and add access profiles. Once you're satisfied with your settings, you can return to the Preferences panel and move on the next step.

If you use CSM authentication

Since access profiles are always enabled with CSM authentication, configure email addresses from the Administration panel as described in **If you use CAM Authentication** above.

1. Optional: Click **Edit Message** next to the relevant email address to customize the subject or content of the message.
2. Specify whether to send the alerts in plain text or HTML.
3. In the **From address** box, specify an email address from which the alert generates, and to which recipients of the alert can respond.



Note: You cannot use angle brackets (< and >) here.

4. In the SMTP server box, specify a valid SMTP Server address for outgoing messages.
5. In most cases, leave the SMTP port and Use encrypted connection (SSL) options as they are, unless your email service provider requires different values.
6. If your email server requires credentials, check the **Change credentials** box and fill in the associated **User name** and **Password**.
7. Click **Save**.



Note: By default, email alerts are generated via a new scheduled task that runs once a day. You can change how often to generate alerts using the Windows Task Scheduler, which is a System Tools accessory that ships with Windows.

How to Add an Asset to the CAM Database

To Add an Asset from Purchasing:

1. From the CAM Purchasing console, select **Line Items**.
2. Under **All Items** in the left pane, select **Hardware**.
3. Select **Assign** next to the chosen asset in the list.
4. Select **Add Assignment** to add a new assignment, or **Edit** to update an existing assignment.
5. Enter the serial number for the asset, and (optional) the machine or user and group to which to assign the asset.
6. Select **Save**.

The asset is created in the CAM Database with the name, type, and manufacturer specified in the line item name, and the serial number specified in the **Search for** field.

Related information

[../cam_administrator/admin_how_to/Admin_How_to_add_an_asset.xml#concept934](http://cam_administrator/admin_how_to/Admin_How_to_add_an_asset.xml#concept934)

How to Add a Hardware Type

To add a hardware type:

1. From the CAM Purchasing console, select **Preferences**.
2. Click **Hardware Types** in the left pane.
3. Click **Add Hardware Type**.
4. In the **Name** box, type in the name of the hardware type to add, then click **Save**.

The new hardware type now appears in the list, and you can select it whenever you add or edit a hardware line item.

Related information

[Purch_Hardware_types.xml#concept1218](#)

How to Assign Hardware Maintenance to a Single Existing Hardware Item

When you purchase a hardware item, you often also purchase a maintenance agreement for that item. Purchasing allows you to track those maintenance purchases. You can track maintenance by itself, or associate maintenance with a hardware purchase record that already exists. It's best to enter maintenance information when you [enter the order for the item itself](#), but there may be times when you need to enter maintenance information for an existing item; for example, if you don't have the original purchase.

To assign hardware maintenance to a single existing hardware item:

1. From the CAM Purchasing console, select **Orders**.
2. Find the order and click **Edit**.



Tip: You can also [Search](#) for an order.

3. At the bottom of the Order screen, click **Add hardware maintenance**.
4. In the Hardware Maintenance Details, fill in the **Name** field, then click the appropriate icon (there's one for maintained hardware and another for maintained line items).
5. Find the appropriate item by searching for it by serial number, or leave the Serial Number field blank to see all records. Click **Search**.
6. In the resulting list, click the **Select** link that's next to the appropriate hardware item, then click **Save**.
7. In Hardware Maintenance Details screen, fill in any additional information, then click **Save**.

Once saved, click **Hardware Maintenance** in the left pane to view and edit hardware maintenance for this item in the Line Items panel.

Related concepts

[How to Add Purchasing Information](#)

[How to Assign Hardware Maintenance to a Single Existing Hardware Item](#)

[How to Search](#)

Related information

[Purch_How_to_assign_hardware_maintenance_to_multiple_existing_hardware_items.xml#concept1510](#)

How to Assign Hardware Maintenance to Multiple Existing Hardware Items

If you have a large number of hardware items that have been inventoried but have no purchasing data, you can export the list of computers, attach purchasing data, and then import the data into Purchasing. For example, suppose you acquired a company with 100 computers. You deployed the CAM Agent to all these machines and those machines now exist in your CAM Database. The company kept no records of their hardware purchases before this time, but you want to be able to associate maintenance with these devices. The following procedure allows you to attach purchasing records to these computers:

1. From the CAM Reporting console, run the Unreconciled Machine Export report.
2. Export the results to a spreadsheet.
3. In the spreadsheet, enter purchasing information for these computers. See [Preparing Your Spreadsheet](#) for information on required fields.

In the example case, all 100 computers could have the same order number, thus creating a single purchase order with 100 line items (one for each computer).

4. In the Status panel, click **Import Purchase Data**.

Related concepts

[Preparing Your Spreadsheet](#)

[How to Assign Hardware Maintenance to a Single Existing Hardware Item](#)

[Importing Purchasing Data](#)

Related information

[Purch_Howtoeditmaintainedhardware.xml#concept2008](#)

[Purch_How_to_import_purchasing_data.xml#concept767](#)

How to Add a Status Type

You can add a status type, which you can then select when adding a hardware, software, or software upgrade line item.

To add a status type:

1. From the CAM Purchasing console, select **Preferences**.
2. Click **Status Types** in the left pane.
3. Click **Add Status Type**.
4. Type the name of the status type to add and click **Save**.

The new status type now appears in the list, and you can select it whenever you add or edit a hardware, software, or software upgrade line item.



Note: If CAM Purchasing Access Profiles are enabled, only CAM Purchasing Administrators can change the status type. For more information, see [Access Profiles](#).

How to Add Line Items to an Order

Once you've entered an order, you can add line items (information about what the order includes).

To add a line item to an open order:

1. Click **Add** below the order number, and select the appropriate line item type from the list:
 - **By Part Number (SKU)**: Enter the exact part number (**SKU**) of the item you want to add. Wildcards are not allowed. If one or more SKUs that exactly match the number you enter are found in the SKU catalog, a list of items opens, and you can select which item to add. Any available information for that SKU is automatically entered in the relevant fields, and you can edit any of it.
 - **Hardware**: Enter at least the item's name and hardware type.

Recommended: Click **Add maintenance** to add maintenance information.
 - **Hardware Maintenance**: Enter the item name.

Recommended: Search for and select the hardware item that this maintenance item covers in the **Maintained Hardware** field.
 - **Software**: Only the item name is required, but you may also want to reconcile the software line item to a license unit via the **Reconcile to** field, or specify that you don't want to reconcile it by checking the **I don't care about reconciling this line item** box.

Recommended: Click **Add maintenance** to add maintenance information for the item.
 - **Software Maintenance**: The item name is required. You may also want to specify what this item is maintaining by selecting **License Unit** or **Line Item** in the **Maintains** field, then search for the license unit or line item.
 - **Software Upgrade**: Enter the item's name. You may also want to include information about the upgrade in the **Upgrade from** and **Upgrade to**.
2. Optional: If the line item is covered by a contract you've already entered, you can search for it and select it in the **Contract** field to associate it with the line item.
3. After completing the required fields, enter any additional information about the item that you want to track or that will help you later identify the item.
4. Click **Save**.

Once the line item is added, you can do any of the following:

- Close the window and refresh the display to see the order you just created.
- Add more line items to your order.
- Edit any listed line items.
- Make general changes to the order by clicking **Edit**.
- Assign a line item to a user or machine, or to a user, machine, or asset group by clicking **Assign**.

How to Assign Line Items

After placing an order, such as for hardware and software, you can assign the line items to a specific user and department that are responsible for those resources.

To Assign a Line Item to a User or Machine

1. From the CAM Purchasing console, select **Assign**.



Tip: You can also [Search](#).

2. Select a category in the left pane, then find the line item from the list in the right pane.
3. Click **Assign**.
4. Complete the fields in the dialog box:
 - Enter the quantity and the serial number, if known.
 - Assign the item to a user or machine, then enter the user or machine name. You can also search for a user or machine.
5. Select **Save**.
6. Optional: Click **Add Assignment** or **Add Multiple Assignments** if you want to make additional assignments.
7. Select **Close**.

To Assign a Line Item to a Group

1. In the Assign panel, click a category in the left pane, then find the line item from the list in the right pane.



Tip: You can also [Search](#).

2. Click **Assign**.
3. Complete the fields in the dialog box:
 - Enter the quantity and name of the group. You can also search for a group.
4. Select **Save**.
5. Select **Close**.



Note: In order to assign line items to users or machines, they must have been discovered and exist in the CAM Database. You can assign line items to groups that you've created or discovered.

To view or assign line items to a group from the Line Items panel:

1. Click a category in the left pane.

2. In the right pane, find the line item in the list.
3. Click **Assign**.
4. Starting with step 3 in *To assign a line item to a group* above, complete the procedure.

If the line item includes more than one item, you can assign them to a group one at a time.

To assign line items to groups one at a time:

1. For each item, enter 1 in the **Quantity** field, and then enter the serial number or assignment information.
2. When you're finished with the first line item, click **Add Assignment** or **Add Multiple Assignments** to add additional line items.

There may be situations where the line item includes multiple items and you want to assign each of them by serial number to the same user or group.

To assign line items by serial number to the same user or group:

1. Enter the total quantity in the **Quantity** box.
2. Assign the items, then click **Save**.
3. Click the **Expand** link associated with the assignment. This expands the single assignment to multiple rows and replicates the assignment information.

Related information

[Purch_How_does_the_allocation_process_work_.xml#concept1895](#)

How to Create Custom Line Item Fields

To create a custom line item field:

1. From the CAM Purchasing console, select **Preferences**.
2. Select **Line Item** under the Custom Fields category in the left pane. The right pane changes to list any existing custom line item fields.
3. Click **Add Custom Line Item Field**.
4. Required: Enter the name and description for the new field.
5. Required: In the Type box, select what type of field to create.



Note: If you want to create a List field type, enter list values in the box that opens.

6. Optional: Mark the **Required** box if you want to require users to complete the field before they can proceed.
7. Click **Save**.

The field you just added now appears in the list, where you can edit or delete it. The custom field will also appear on the screen where you enter line items.

How to Delete or Change a Contract/Line Item Association

To delete or change a contract/line item association:

1. From the CAM Purchasing console, select **Line Items**.
2. Find the line item you want and select **Edit**.
3. In the Details window, select the **X** next to the Contract field to remove the association, or click **Search** to find and select a different contract.
4. Click **Save**. The line item is no longer covered by the previous contract.

You can also delete or change a contract/line association from the Contracts panel.

1. After clicking the contract's **Edit** hyperlink, click the **Order Number** hyperlink of the order that includes the line item, or click **Browse** to find it.
2. In the Order Details box, click the **Edit** hyperlink for the line item.
3. Clear the **X** next to the Contract field to remove the association, or click **Search** to find a different contract.
4. Click **Save**.

How to Delete a Line Item

To delete a line item, first open the order that contains it, then delete the line item.

To delete a line item:

1. From the CAM Purchasing console, select **Line Items**.
2. From the left pane of the Line Items panel, click **All Line Items**, or click another category to find the line item you want to delete.
3. In the right pane, click the **Order Number** hyperlink associated with the line item.
4. Click **Delete** to the far right of the line item you want to delete, then click **OK** to confirm the deletion.

How to Edit a Line Item

To edit a line item:

1. From the CAM Purchasing console, select **Line Items**.
2. Select **All Line Items** or another category to find the line item you want to delete.
3. Click **Edit** next to the line item you want to change, then make your edits.
4. Click **Save**.

How to Manage Line Item Exceptions

If your Status panel in the CAM Purchasing console includes a yellow **Exceptions** section at the top right of the screen, you have line items that are reconciled to a License Analytics title, but are either not associated with a contract or a quantity unit is not specified. To get meaningful results in License Analytics and prevent exceptions, we recommend correcting these issues.

To manage line item exceptions:

1. From the Status panel's yellow **Exceptions** section, click the first link in your list.
2. In the right pane, click the **Edit** link associated with a line item.
3. Do one of the following, depending on the issue:
 - Select a contract to which to associate the line item.
 - Enter a unit quantity for the line item, if required.
4. Click **Save**.
5. Back at the list of line item exceptions, repeat these steps for each of them until you've corrected all of the exceptions in the list.

How to Migrate Line Items to Core-based Licensing

If your Status panel in the CAM Purchasing Purchasing console to-do list includes a yellow **Migrate** section, at least one contract covers software line items that are reconciled to certain versions of Windows Server that require core-based (rather than processor-based) licensing. In order to get meaningful results in License Analytics and prevent exceptions, we recommend migrating the line items to use core-based licensing.

To migrate software line items to use core-based licensing:

1. From the Status panel's yellow **Migrate** section, click the first link in your list.
2. In the right pane of the Migrate Contracts section, click the **Migrate** link associated with a contract.
3. In the window that opens, note the original and new quantity and unit price for each item. You can then do either of the following:
 - Click an order number hyperlink to edit the order and line item yourself

- or -

 - Select one or more line items, then select one of the following to have Purchasing update the items for you:
 - Migrate selected items with new quantity and unit price
 - Migrate selected items with original quantity and unit price
4. Repeat these steps for any items still need to be migrated, then click **Close**.

How to Reconcile Line Items

If you didn't reconcile line items as you added them to an order, you can reconcile them at any time in the Reconcile panel.

To reconcile line items:

1. From the CAM Purchasing console, select **Reconcile**.
2. Click one of the Unreconciled categories on the left to see a list of unreconciled line items of each type.
3. Find the line item you want and click **Reconcile**.
4. Search for a license unit (for software), machine (for computers), or hardware (for other hardware assets) to which to reconcile the line item.

For software items, you can also specify a licensing type.

5. Click **Save**.

How to Specify that Line Items Not Be Reconciled

If there are any line items you don't want to reconcile, you can move them into one of the Reconcile panel's Don't Care categories:

1. From the CAM Purchasing console, select **Reconcile**.
2. Click one of the Unreconciled categories on the left.
3. In the list that appears on the left, find the line item you want and select its check box.
4. Click **Move selected items to Don't Care**.
5. Click **Yes** to confirm.

The line item is now moved to the relevant Don't Care category. You can always reconcile any items that appear in these categories by selecting **Reconcile**.

Maintenance Agreements

How to Renew a Maintenance Agreement

To renew an existing hardware or software maintenance agreement:

1. From the CAM Purchasing console, select **Line Items**.
2. In the left pane of the Line Items panel, find the **Expiring** category, then click **Hardware Maintenance** or **Software Maintenance**.
3. Click **Renew** next to the line item you want to renew.
4. Enter information about the order, then in the second section of the window, enter information about the line item you are renewing.
5. Click **Save**.

The Line Items panel updates with the new information and the line item no longer falls under an Expiring category.

Orders

How to Add a Manufacturer or Vendor

Add a manufacturer or vendor to line items or contracts.

To add a manufacturer/vendor:

1. From the CAM Purchasing console, select **Preferences**.
2. Select **Manufacturers/Vendors** in the left pane.
3. Use the arrows to scroll through the list, or [search](#) for a specific name.
4. When you find the one you want, click **Add Manufacturer/Vendor**.
5. Complete the fields, then click **Save**.

The manufacturer/vendor you added is now listed, and available for you to select when you add line items or contracts.

How to Add Purchasing Information

To add purchasing information:

1. Optional: Before create orders, you may want to create [custom fields](#). Once you've created custom fields, you can then fill in those fields as you enter orders and add line items to them.
2. [Enter a new order](#).
3. [Add line items to the order](#).

How to Change Which Access Profile Is Applied to One or More Orders

Access profiles control who has access to orders in Purchasing. You can apply access profiles to specific orders.

To change which access profile is applied to one or more orders:

1. From the CAM Purchasing console, select **Administration > Order Administration**.
2. Select an access profile from the list in the right pane. The pane updates to show all orders applied to the selected access profile.
3. Check the box(es) next to the order(s) you want to change, and click **Change selected orders**.
4. In the Change Access Profile dialog box that opens, select another access profile and click **OK**.

Related information

[Purch_Overview_Purchasing_user_policies.xml#concept2017](#)

How to Create Custom Order Fields

To create a custom order field:

1. From the CAM Purchasing console, select **Preferences**.
2. Select **Order** under the Custom Fields category in the left pane.
3. Select **Add Custom Order Field**.
4. Required: Enter a name, description, and type.



Note: If you want to create a List type of field, enter list values in the box that opens.

5. Optional: Select the **Required** box if you want to require users to complete the field before they can proceed.
6. Select **Save**.

The field you just added now appears in the list, where you can edit or delete it. The custom field will also appear on the screen where you enter orders.

How to Delete an Order

When you delete an order, you also delete any line items in that order.

To delete an order:

1. From the left pane of the Orders panel, click **All Orders**, or click another category to find the order you want to delete.
2. In the right pane, click **Delete** to the right of the order you want to delete, then click **OK** to confirm.

How to Edit an Order or Contract to Include a Document

To edit an order or contract to include a document:

1. From the CAM Purchasing console, select **Documents**.
2. Locate your document in the Documents panel, then select **Reference**.
3. Select the order or contract if it is shown. Otherwise, you can [search for it](#). You can use [wildcards](#) in searches.
4. Click **Select** to select the order or contract.
5. Click **Save**.



Note: Once you reference a document in an order or contract, you must first delete any references before you can delete that document.

Related information

[Purch_How_to_upload_a_document.xml#concept1515](#)

How to Enter an Order

Entering a new order is generally the first step in adding purchasing information.

To enter an order:

1. From the CAM Purchasing console, select **Orders**.
2. Select **All Orders** in the left pane, then click **Add purchase** or **Add lease**.
3. Complete the fields; Order Date and Order Number are required.



Note: Your user name and domain are shown in the Created By field at the bottom, which can be useful when viewing order history later.

4. If Purchasing user policies are enabled or you use CSM authentication, the Access Profile field is also required. Select an Access Profile from the list.
5. Optional: If you want this order to reference another document, such as a file that explains or authorizes the purchase, do one of the following:
 - Click **Upload New** and select the document. We recommend uploading documents instead of linking to them, because you can see the document.
 - Click **Add Linked** and select the document.
 - Click **Browse Existing** to find a document that you've already uploaded or linked.
6. Click **Save**. The screen updates so that you can enter information about what the order includes (the line items). Proceed to **How to Add Line Items to an Order**.

Related concepts

[Access Profiles](#)

[How to Set Up CSM Security Groups, Teams, and Users](#)

[User Policies](#)

[How to Add Line Items to an Order](#)

How to Upload a Document

To upload a document so that you can later associate it with an order or contract:

1. From the CAM Purchasing console, select **Documents**.
2. Select **All Documents** in the left pane, then click **Upload Document** in the toolbar. The right pane of the screen shows a Document Details screen, and documents that were previously uploaded are shown at the bottom.
3. Required: Enter a description for the document.
4. Browse to the document.
5. Click **Save**. The document is now listed when you click All Documents on the left.

Once you've uploaded a document, you can do the following:

- Click **Edit** to edit its description.
- Click **Reference** to associate the document with an order or contract.
- Click **Delete** to delete the document if it's not referenced by an order or contract.




Note: If an order or contract references a document, you must first delete those references, then delete the document.

We recommend uploading documents instead of linking to them. If you have existing linked documents you want to convert to uploaded documents, see [How to Add a Link to a Purchasing Document](#).

How to View Order History

To view information about the history of an order:

1. From the CAM Purchasing console, select **Orders**.
2. Select **All Orders**.
3. In the right pane, find your order and do one of the following:
 - Click its  icon.
 - or -
 - Click **Edit** to open it, then click **View History**.



Note: You can also select the history icon from the Line Items panel, if you [customized your columns](#) to show the History column.

Nicknames

How to Create a Nickname

To create a nickname for a software name or manufacturer/vendor:

1. From the CAM Purchasing console, select **Preferences**.
2. In the Preferences panel, select **Nicknames** in the left pane.
3. Depending on the type of nickname you want to create, click either **Software** or **Manufacturer/Vendor**.
4. In the right pane, click either **Add Software Nickname** or **Add Manufacturer/Vendor Nickname**.
5. Enter the nickname to use, and select the software or manufacturer/vendor name to associate with it. You can also search for a name.
6. Click **Save**.

Related concepts

[Nicknames](#)

[How to Search for Names, Serial Numbers, or Part Numbers \(SKUs\)](#)

How to Delete a Nickname

To delete a **nickname** for a software name or manufacturer/vendor:

1. From the CAM Purchasing console, select **Preferences**.
2. In the Preferences panel, select **Nicknames**.
3. Depending on what type of nickname you want to create, click either **Software** or **Manufacturer/Vendor**.
4. In the right pane, find the nickname you want to delete, then click **Delete**.
5. Click **OK** to confirm.

Related concepts

[Nicknames](#)

Searches

How to Search

You can search for records that meet your criteria. For example, you can search for all records that include a text string or that exceed a given price.

To search for purchasing records from within the CAM Purchasing console:

1. If the Search window is already open, go to step 4.

Otherwise, depending on what type of information you need, from the CAM Purchasing console, go the panel where you'd expect to find that information. (For example, for contracts, go to the **Contracts** panel.)

2. Click a category (other than Information) on the left.
3. In the toolbar that opens in the right pane, click **Search**.
4. In the **Search in** box, select a column or a column type.
5. In the **for** box, enter a value (numerical, text, currency, or date).
6. In the **where value is** box, select your options.
7. Click **Search Now**.

A list of records that meet your criteria are shown.

How to Search for Names, Serial Numbers, or Part Numbers (SKUs)

As you enter or edit information, you may need to find a name, serial number, or part number (SKU).

To search, do the following:

1. From the CAM Purchasing console, click the icon next to the relevant field.
2. Enter all or part of the name or number to find. If you're searching for a contract, you can also select **Show only Active contracts**.



Note: You can't use wildcards or enter a partial number for SKUs. If you leave this field blank, Purchasing will return all records.

3. Click **Search**.

How to Use Wildcards in Searches

When searching, keep the following in mind when entering your search string.

- You can use * and ? wildcards in your searches.
 - * is a wildcard character used to indicate zero or more characters in a folder name. For example, "a*c" will match "ac", "abc", "a12345c", and so on.
 - ? is a wildcard character used to indicate any single character in a folder name. For example, "a?c" will match "aac", "abc", "acc", "a2c", "a c", and so on.
- If you don't use a wildcard in the search string, the searching mechanism assumes you're performing a substring search and adds a * wildcard to the beginning and end of the string you entered. If you've explicitly entered wildcards in your string, however, the searching mechanism does not add any wildcards.
- You cannot use * or ? literally. These characters are always interpreted as wildcards.

Importing Purchasing Data

The Cherwell Asset Management Purchase Import mechanism is designed to import various purchasing records. It also gives you the ability to assign these records to users, machines, and groups.

Importing purchasing data is a multi-step process that requires some preparation and understanding of how the data will transfer. See the following topics, in order, for help with each step.

Preparing CAM Administrator for Importing Purchasing Data

The first step in preparing to import purchasing data is to prepare CAM Administrator. You'll need to do the following:

1. [Discover machines and users via Active Directory.](#)

This will populate the CAM Database with your organization's user names, machine names, and Active Directory group structure. This is important because if you want to be able to assign imported purchases to a user, that user must exist in the CAM Database. Further, if your spreadsheet includes a user name that doesn't match with a known user in the CAM Database, the import process will generate an error.



Note: If you have any of the following in your environment, you should discover them as well. Click the links for discovery procedures:

- [Virtual machines](#)
- [Linux, Unix, or Mac OS machines](#)

You can also create [other assets](#) if you want to be able to reconcile to them.

2. [Create user-defined machine groups.](#)

Besides being able to assign data to a user as described above, you may also want to assign that purchase to an organization or group. You can assign a purchase to a discovered Active Directory group (see above), but you can also create your own machine groups in CAM Administrator, and then assign purchases to those groups. For example, you may want to assign all finance-related software to machines in your finance department. Even if your Active Directory groups don't include a group for this department, you can create your own in CAM Administrator, and then assign items accordingly. Make sure that the group names in the spreadsheet you plan to import (in a later step) match the group names in CAM Administrator.

3. [Create user-defined asset groups.](#)

This is similar to the previous step, but involves non-computer hardware such as switches, routers, firewalls, and so on. To assign these items to a user-defined group, make sure that the group exists in CAM Administrator's Other Assets panel, and that the asset group names in your spreadsheet match.

4. [Create user-defined user groups.](#)

Similar to the above. You can use user-defined user groups to assign software that is licensed on a per-user basis.

Once you've set up CAM Administrator, proceed to the next step: [Preparing Purchasing for Importing Purchasing Data.](#)

Preparing Purchasing for Importing Purchasing Data

Once you've prepared CAM Administrator, prepare Purchasing to import purchasing data by completing the following steps:

1. [Create custom order fields](#)
 - Order fields represent the data at the highest level of an order, such as the order number, order date, etc..
 - View Purchasing's Order screen by selecting the Orders tab, then clicking **Add purchase** or **Add lease**.
 - If your spreadsheet includes a data field that you want to import but doesn't map to the default order fields on this screen, create a custom order field to map this data.
2. [Create custom line item fields](#)
 - Line Item fields represent data at the line item level of an order (i.e., the contents of an order).
 - View the various Line Items screens by selecting the Line Items tab, and then selecting categories from the left pane.
 - If your spreadsheet includes data that you want to capture at the line item level but it doesn't map to a default line item field in Purchasing, create a custom line item field to map this data.
3. [Create custom hardware types](#)
 - Hardware types represent the type of hardware that will be imported.
 - To view the default hardware types, click the Preferences tab, then click **Hardware Types** in the left pane.
 - When importing hardware information, your spreadsheet must include a hardware type column, and it must match one of the types listed in the Hardware Types section of the Preferences panel; the exception is **Computer** as an allowed hardware type, which is not in the Preferences panel.
4. [Create custom status types](#)
 - To view the default status types, click the Preferences tab and then click **Status Types** in the left pane.



Note: Status types are not required for importing data.

Once you've completed these items, proceed to the next step: [Preparing Your Spreadsheet](#).

Preparing Your Spreadsheet

Once CAM Administrator and Purchasing are ready for the import process, modify your spreadsheet so you can successfully import it.

The following describes the required fields and values that must exist in your spreadsheet. Each of these items require a column in the spreadsheet you intend to import.

Order Level Field Requirements

All items that you import, independent of type, require some basic order information:

- **Order number:** A text value representing an order number. If the vendor did not provide an order number, you can create one.
- **Order date:** The date of the activity.
- **Order type:** This value allows you to have a single spreadsheet with both purchase and lease data. This value specifies which records are purchases or leases:
 - **Purchase:** *P* or *Purchase*
 - **Leases:** *L* or *Lease*

Line Item Type Values

The line item type value represents whether an item to be imported is software, hardware, software maintenance, or hardware maintenance:

- **Software:** *S* or *Software*
- **Hardware:** *H* or *Hardware*
- **Software maintenance:** *SM*, *SOFTWAREMAINTENANCE*, or *SOFTWARE MAINTENANCE*
- **Hardware maintenance:** *HM*, *HARDWAREMAINTENANCE*, or *HARDWARE MAINTENANCE*

Line Item Type Requirements

The following represent the field requirements based on the line item type (software, hardware, software maintenance, or hardware maintenance):

Hardware Detail Requirements

- **Name:** This can be a description of the hardware item.
- **Quantity:** The number of items.
- **Hardware Type:** This must either match a hardware type in the Preferences panel or be **Computer**. See [Preparing Purchasing for Importing Purchasing Data](#) for more information.

Hardware Maintenance Detail Requirements

- **Name:** This can be a hardware item or a description of the service.

Software Detail Requirements

- **Name:** Usually the product name.
- **Quantity:** The number of items purchased.
- **License type(s):**
 - **Concurrent:** *concurrent*
 - **Freeware:** *freeware* or *free*
 - **Per core:** *per core*, *percore*, or *core*
 - **Per processor:** *per processor*, *perprocessor*, or *processor*
 - **Per seat:** *per seat*, *perseat*, *seat*, *nonconcurrent*, *non concurrent*, or *not concurrent*
 - **Per seat with usage:** *per seat with usage* , *perseatwithusage* , *per seat usage* , *perseatusage* , or *usage*
 - **Per server:** *per server*, *perserver*, or *server*
 - **Shareware:** *shareware*
 - **Per user:** *per user*, *peruser*, or *user*
 - **Site:** *site*
 - **Unmanaged:** *nolicensing*, *none*, *unmanaged*, or *not managed*

Software Maintenance Detail Requirements

- **Name:** description of the software maintenance.

Assignment Requirements

Optional: You can assign imported purchasing records to a user or machine, and then assign them to a group. If you want to be able to assign imported records, your spreadsheet should include the following fields:

- **Serial number:** The serial number of the hardware or software item being imported. This field is optional.
- **Assigned type:** You can assign imported software items to users or machines (depending on license type); you can assign imported computers to users, and other assets to either users or machines.
 - **User:** *User*
 - **Machine:** *Machine*
 - **Unassigned:** {blank value}
- **Number of items assigned:** There are three use cases for assigning during import:
 - Every individual item is assigned to one person/machine. In this case, let the purchasing import process create the assignment quantity of 1 for you. You don't need a separate column in your spreadsheet. Leave **Number of items assigned** unmapped.

- Items are assigned in bulk to one person/machine (the entire quantity ordered is assigned to the same person; for example, the head of a department). In this case, you can map line item quantity and number of items assigned to the same column in your spreadsheet.
- Mixture of individual and bulk assignments. In this case, you must have separate columns for line item quantity and assignment quantity.
- **Assignment group:** This field is designed to be mapped to a group name that matches a group created in CAM Administrator. For **Per user** license units, the group name must match a user group. For machines and all other (not **Per user**) license unit license types, the group name must match a machine group. For other assets, the group name must match an other asset group.

When you're satisfied with your spreadsheet, proceed to the next step: [Importing Data into Purchasing](#).

Importing Data into Purchasing

Once you've prepared CAM Administrator, Purchasing, and your spreadsheet for the import process, you can start the actual import.

To launch the import process:

1. Click the Status tab.
2. From the list on the right, click **Import Purchase Data**.
Select a spreadsheet and worksheet, specify the type of import, the access profile if necessary, and map the fields to your spreadsheet.
3. Preview the data.
 - This is the last step prior to importing your purchase data. The preview shows the data that will be imported.
 - The first column displays errors that occur on a row by row basis. You can sort this column to show all rows with errors at the top.
 - Review this data carefully to ensure that the proper columns are mapped and the data is represented properly.
4. Complete the process when you are satisfied with the preview.

Notes:

- Multiple rows of data with the same order number and vendor will be consolidated into the same order.
- If a lease spans multiple order numbers, it will be imported with each order. This may require you to change the total price and monthly cost accordingly. To do this, cancel the import process and revise your spreadsheet, or change the total price and monthly cost after the import process completes.
- If you want to consolidate these orders under a single lease number, the lease number must be the same for each line item it includes.

Troubleshooting

Related information

[../cam_administrator/admin_troubleshooting/Admin_If_some_items_are_unavailable.xml#concept3867](http://cam_administrator/admin_troubleshooting/Admin_If_some_items_are_unavailable.xml#concept3867)

Troubleshooting: Can't Open Linked Document

You may see an error message if you attempt to open a linked document that is on a UNC path in these situations:

- The file name contains a pound sign (#).
- Your browser blocked access. You can change your browser's security settings or use the following workaround.

In both situations, you can upload a document instead. Alternatively, you can put the document on a web server and specify its URL, rather than browse for it. For example, type something like this:

`http://iisserver/purchasing-documents/application-serialnumbers.txt`

Not:

`\\share\pathtofile\application-serialnumbers.txt`

Troubleshooting: Currency Issues

If Reporting and Purchasing users in your organization use different language settings in their browsers, please read on for a description of possible currency issues and how to avoid them. This topic is not relevant for organizations where all of these users have the same browser language settings.

Cherwell Asset Management supports a single currency, and all currency data is stored without a currency symbol. Reporting and Purchasing determine which currency symbol to display to the logged-in user based on that user's language settings in the current browser. But when users have different browser language settings, currency issues can occur when interpreting data and exporting reports to Microsoft Excel.

Example of When Currency Issues Can Occur

Say User A uses English (United States) and User B uses English (United Kingdom) for their language settings in their browsers. When User A enters an order in the Purchasing, \$ (the dollar sign) is displayed in currency fields. When User B views that order or runs a report that includes data from that order, £ (the British pound sign) is displayed in currency fields. So the currency symbol is different, but numbers that follow the currency symbol are unchanged (not converted to the new currency).

What to Do

To avoid such currency issues, affected organizations can take the following steps:

- Decide on a standard, single currency to use for all currency data.
- Communicate that standard to all users of Reporting and Purchasing.
- Instruct users who need to use a language other than the standard for other tasks to add the standard to their list of languages in their browsers, and then change to the standard before starting Reporting or Purchasing.



Note: You may also notice similar currency issues in CAM Administrator.

Troubleshooting: Exporting to Excel

You can export data to an Excel spreadsheet by clicking the Export to Excel item in the right pane's toolbar. When you do this, the data is written in HTML/CSS format and saved with a .XLS extension. Excel 2007 (and above) expects the data in a .XLS file to be in Excel binary format and will display a warning when you attempt to open the file. You can safely answer "Yes" to the warning dialog box to open the file.