License Management

User Manual

October Revision

This is a user manual to perform software license management in justSAMit. This manual outlines the step by step approach in managing software license purchases, authorizing license usage and how you can effective use this information to manage your software asset in your organization.

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justSAMit License Management Overview

Introduction

License Management is to manage purchase and inventory of software and machines. Users are able to manage purchase, software authority and generate reconciliation reports.

In order to access the pages, users must have following rights:

1) **Reporting User**

   Reporting Users are accessible to Purchase Order, Software Reconciliation and Machine Reconciliation pages. However, they may not add, modify or remove any records from Purchase Order or Authorization pages.

2) **License Purchase Moderator**

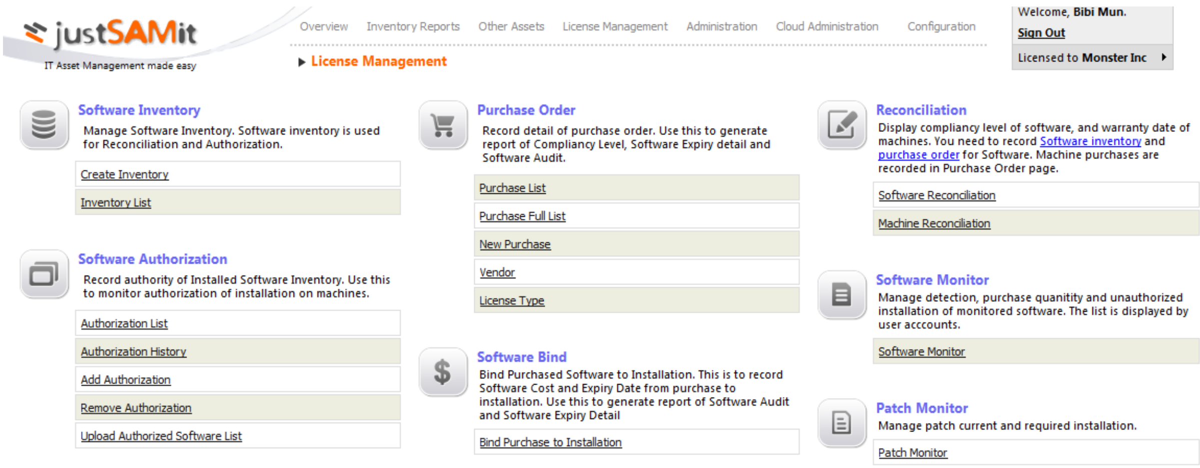
   License Purchase Moderators are accessible to Purchase Order, Bind Purchase to Installation, Vendor and License Type page. These users are able to add, modify or remove Purchase Orders, Vendors and License Types.

3) **License Authorization Moderator**

   License Authorization Moderators are users that able to access Authorization pages. These users are able to add or remove authorization of Software Installation.

Note: User rights can be changed at Administration page

License Management Overview



Name	Description
Software Inventory	Group software with common names into a single software inventory. This is very useful in license compliancy management.
Purchase Order	Records Purchase Information. Users may add, modify or remove purchase records in this page. Click Add Purchase Order to insert a purchase order.
Reconciliation	Display software licensing gaps and its compliancy level. Recorded purchases for machines can be seen here.
Software Authorization	Record authority of installed software inventory.
Software Bind	Bind purchased software to installed Software. This is to record the installed Software with purchase information such as Cost and Support Expiry Date. In addition, it is also to identify the purchased software already installed on machines.
Software Monitor	Manage and monitor selected purchased software.
Patch Monitor	Manage and monitor patches and hotfixes installed.

Software Inventory

The objective of having this function is to allow user to group software with common names into a single Software Inventory so to manage the license compliancy level easier. For example, SAMLite will capture Microsoft Office Enterprise 2007 with a few different versions, where they are the same software. With Software Inventory, users can group them together. This feature will affect Software Authorization, Purchase Order, Software Reconciliation, Compliancy Level, Software Expiry details and Software Audit.

In this section there are parts to look at:

- Inventory List
- Create Inventory

Inventory List

In the **Inventory List** page, user will see a list displayed as below:

Create Software Inventory

5 records Display software Search

	Display Name	Version	Publisher	Software
☐	Microsoft Office Enterprise 2007 (Edit)	12.0.4518.1014		2
☐	Microsoft Office Professional Plus 2010 (Edit)	14.0.4536.1000		2
☐	Microsoft Office Project Professional 2007 (Edit)	12.0.4518.1014		2
☐	Microsoft Visual Studio Team System 2008 Development Edition - ENU (Edit)			3
☐	SAMLite 5.0 (Edit)	5.0	ISA Technologies	1

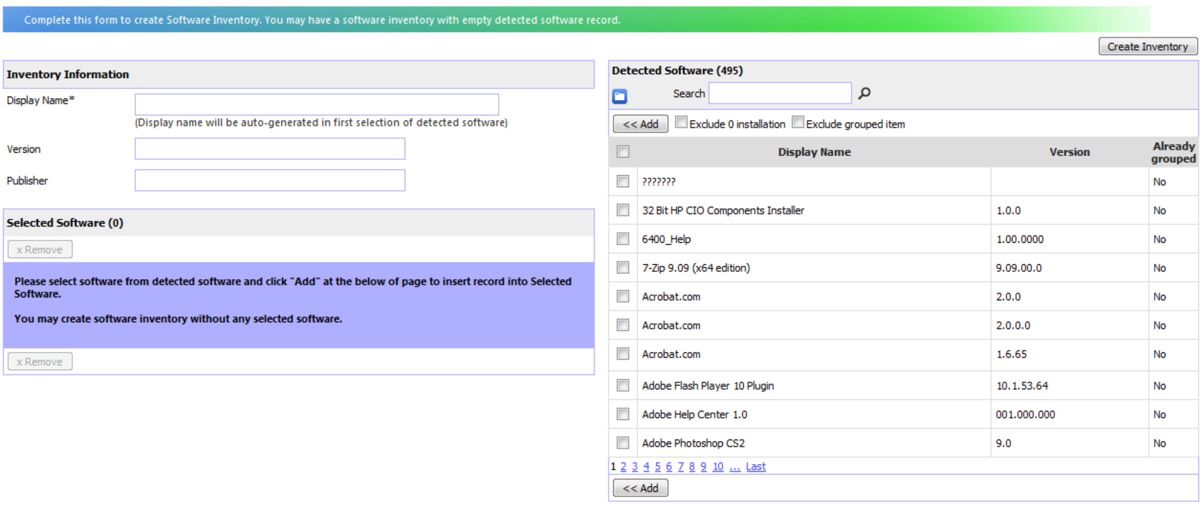
Displayed is software that has already been put into group.

Item/Column	Description
Display Name	Name of the software group. Click on the **Display Name** header will allow user to sort the record by alphabetical order (A-Z) or (Z-A).
Version	Software group's version. Click on the **Version** header will allow user to sort the record by alphabetical order (A-Z) or (Z-A).
Publisher	Name of the software publisher. Click on the **Publisher** hearder will allow user to sort the record by alphabetical order (A-Z) or (Z-A).
Software	Displayed the total number of software grouped under this software group. Click on the **Software** header will allow user to sort the number from largest to smallest or smallest to largest.

Display software	If the box is checked, user will be able to see what are the software and its version parked in the each of the software group.
Search	Allows user to narrow down the list by typing in the search criteria/keyword in the search box and click on the search button. Search will be done on the Display Name (Software Name), Version, Publisher and Software.
Create Software Inventory	Click on this icon/link will lead user to page where they can create and group for the common software.
	Check on the checkbox next to the displayed software name and click on this button will allow user to delete the software group from the list.

Create Inventory

In the **Create Inventory** page, user can create software group from the list of software detected install in users' machines (**Detected Software** pane on the right) or create software group that has been installed by user without selecting from the list on the right.



Item/Column	Description
Display Name*	Display name will be auto-generated in first selection of **Detected Software**. However, the **Display Name** is edit-able in the box itself.
Version	Version will be auto-generated in first selection of **Detected Software**. However, the **Version** is edit-able to user in the box itself.

Publisher	Where user can insert the name of the **Publisher**. This field can be left blank.
Display Name	Name of the software group. Click on the **Display Name** header will allow user to sort the record by alphabetical order (A-Z) or (Z-A).
Version	Software group's version. Click on the **Version** header will allow user to sort the record by alphabetical order (A-Z) or (Z-A).
Already Group	Indicate whether displayed software is already group into a software group or otherwise. Shown result will be **Yes** or **No**.
	Click on this will allows user to filter the list of **Detected Software** based on the **Software View**.
Search	Allows user to narrow down the list by typing in the search criteria/keyword in the search box and click on the search button. Search will be done on the Display Name (Software Name) and Version.
Exclude 0 installation	Checking this checkbox will filter out a list of **Detected Software** that has "0" installation.
Exclude grouped item	Checking this checkbox will filter out a list of **Detected Software** that has already been put into group (in the Already **Grouped** column, there will be a **Yes** indication).

Follow the steps below to create inventory (software group):

1. Go to **License Management** from the top menu. Click on **Create Inventory** from **Software Inventory** section.
2. From the **Detected Software** list, select software to be grouped together. E.g.: **Microsoft Enterprise 2007**.
3. Please note that you will see that the **Display Name** is already auto-generated.
4. Click on << Add button to have the selected software populated in the **Selected Software** list (on the left pane).
5. Should you have decided that there are some software you do not wants to include in the **Selected Software** list, you may remove by checking the checkbox and click on x Remove button.
6. When you have finished adding the software, click on Create Inventory . And you will be redirected to the **Inventory List** to see created inventory.

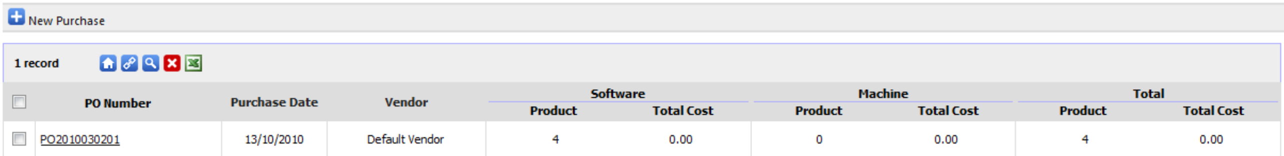
Purchase Order

This is where user records their software and machine purchases. Information such as Software Purchased, License Type, Number of License purchased, Machine Model, Software and Machine Price and etc will be recorded.

In this section, there are 5 parts to look at:

- Purchase List
- Purchase Full List
- New Purchase
- Vendor
- License Type

Purchase List



New Purchase

1 record

	PO Number	Purchase Date	Vendor	Software		Machine		Total	
				Product	Total Cost	Product	Total Cost	Product	Total Cost
	PO20100030201	13/10/2010	Default Vendor	4	0.00	0	0.00	4	0.00

This page is to display a list of created purchase orders with vendor, products and total price of Software and Machine.

Column	Description
PO Number	Name of Purchase Order.
Purchase Date	Date where the purchase order is recorded.
Vendor	Display vendor name.
Software Product	Number of software products.
Software Price	Total Price for All unit of software.
Machine Product	Number of machine products.
Machine Price	Total Price for All units of Machines.
Total Product	Summation of Total Software Product and Total Machine Product.
Total Price	Total Price of Purchase Order

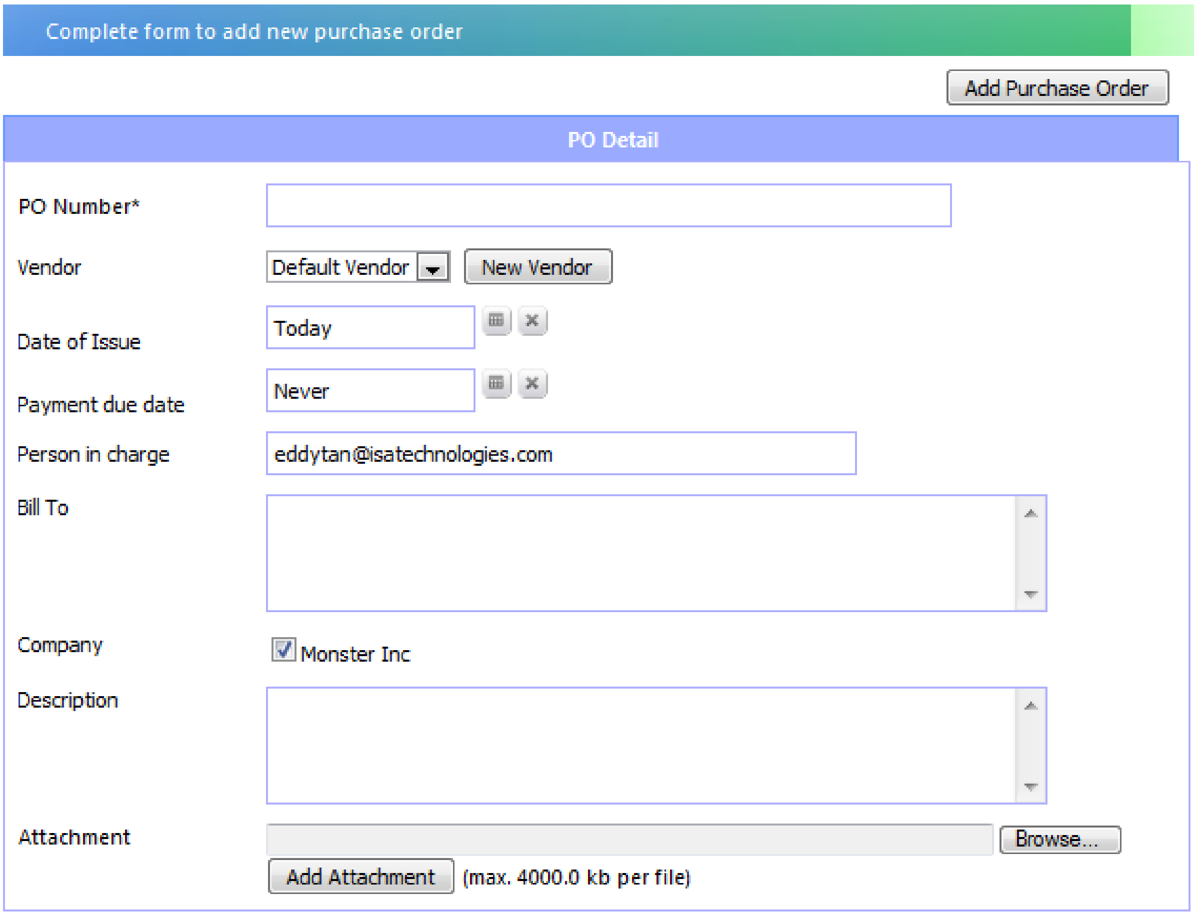
To see further details of the created purchased order, user should click on the PO Number.

New Purchase

This page is where user creates new purchase order.

Follow steps below to create a new purchase order:

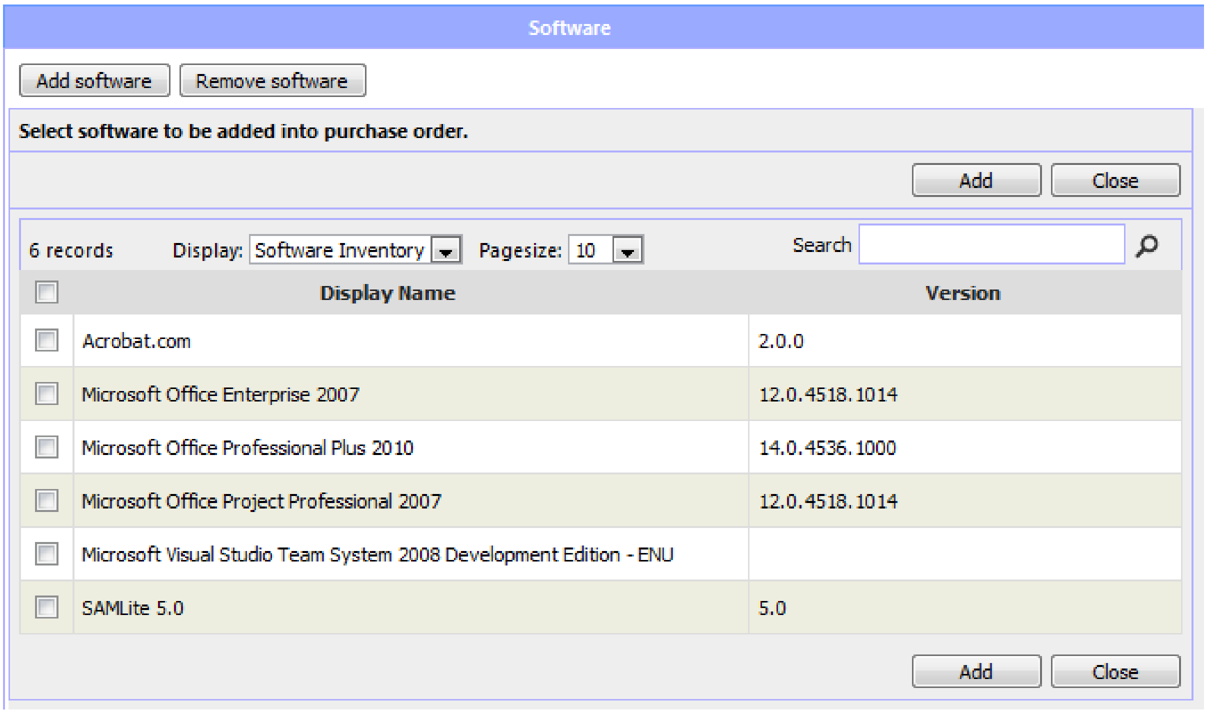
1. Click Add Purchase Order to add new purchase order.

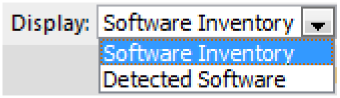


Field Name	Description
PO Number	Number of the purchase order.
Vendor	Vendor Details of current PO. You may click on the drop down list if you already have a list of vendor created. Else, user must click on New Vendor to add new vendor. Complete the fields and click Create to add the vendor.
Date of Issue	Issued date for current PO.
Payment due Date	Payment due date of current purchase order. If the PO has already fully paid, you can set the value as “never”. (Simply empty the field to have the value)
Person In charge	Person who handles current PO
Bill To	Location, person or company the being billed. This field can be name, company name or address

Company	Select company that belonged to the PO
Description	Additional notes
Attachment	External files that related to the PO. The file size must not exceed 4.0 Megabytes

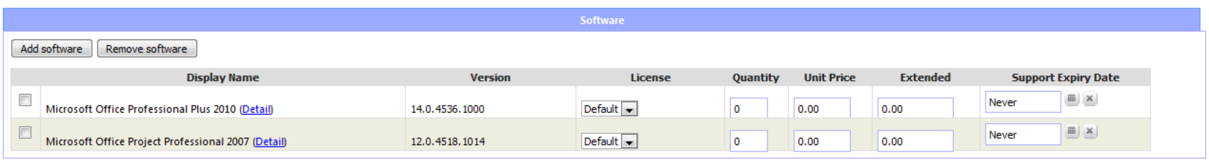
2. To record purchased product for:
    a. **Software Product**



- Click **Add Software Product** button.
- Select software from the  list.

- User may narrow down the list by typing in the search criteria/keyword into search box.
- Select software by checking the checkbox and click on  button.

- Now, user have to fill in the following:



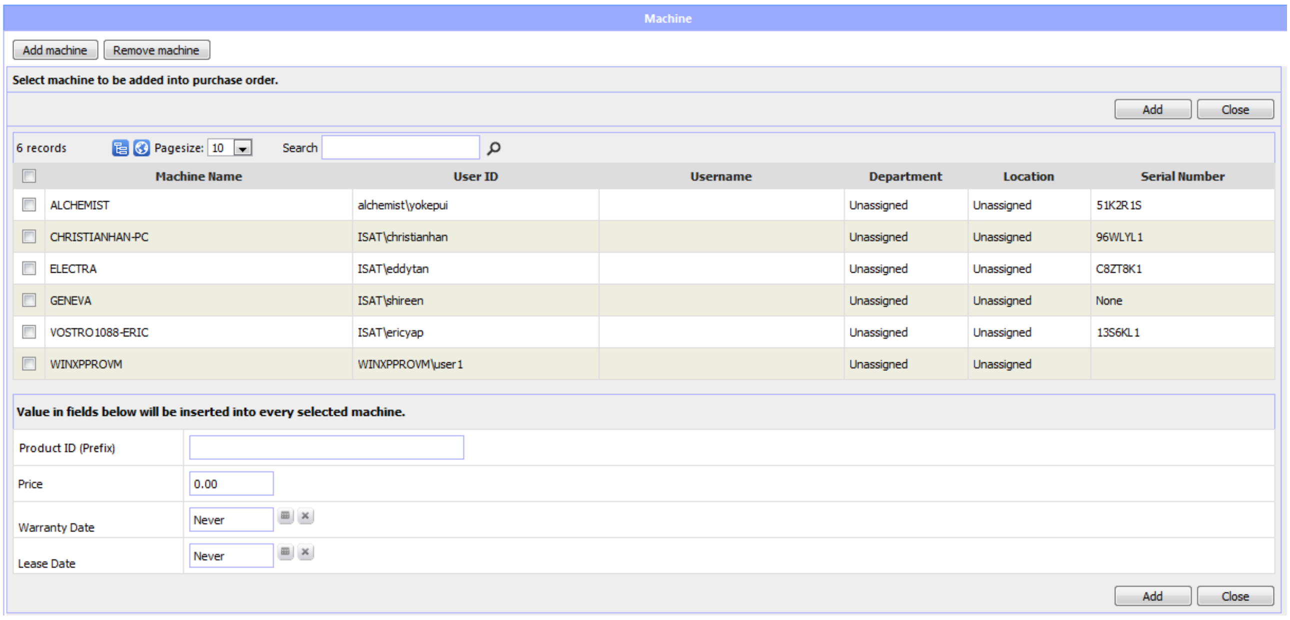
    - Select the license type for this software
    - Number of license purchase in the quantity column
    - Insert price for per unit
    - Extended will be auto calculated
    - Select the support expiry date by clicking on the “calendar” icon.

Column name	Description
Software Product	Name of purchased software, together with its version
License	License type of purchased software. You may select a license from the list.
Quantity	Quantity of purchased software. Cannot be 0
Price	Price of purchased software.
Extended	Summation of quantity and price. This field will be auto-generated once quantity or price is changed
Support Expiry Date	The expiry support/maintenance date of purchased software. Empty this field to set the value "never"

You may remove a software product by ticking the checkboxes and click **Remove**

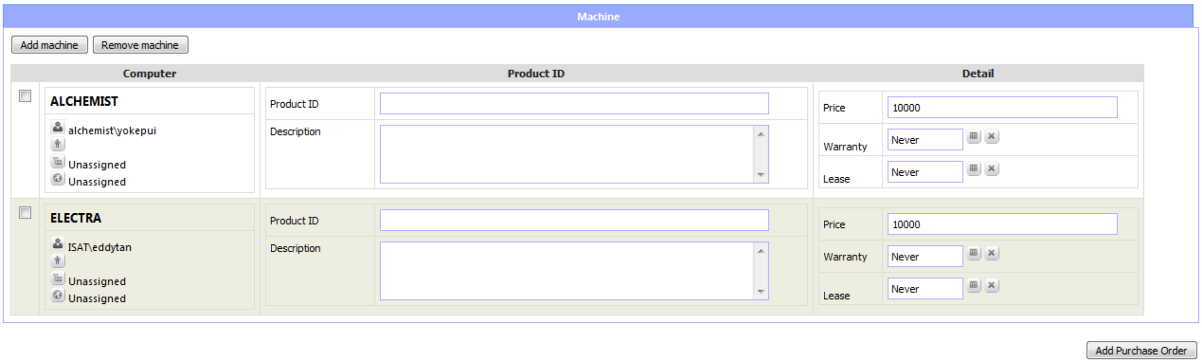
b. Machine Products

- To insert purchased Machine products, click Add Machine Item button.
- User will see the following screen:



- User will have to check the checkbox in order to select machine from the list.
- Insert the value for Price, Warranty Date and Lease Date if selected machines have the same value for above fields. And click Add to proceed.

- User will then see the following screen:



Column name	**Description**
Computer	Computer name, together with Department and Location
Product ID	Product ID and its description. Product ID can be the item name or Model of selected machine item
Product Details	Price: Price of the machine Warranty: Warranty date of the machine Lease: Lease expiry date of the machine

- You may remove a machine item by ticking the checkboxes and click **Remove.**
- After you have done, click **Add Purchase Order**.

Note 1: The mandatory fields of Purchase Order are PO Number, Vendor and have at least 1 software/machine product.

Note 2: If the selected machine items are already under other purchase order, you will be redirected to a confirmation page. Click Confirm to change the machines into current PO, or cancel to change the machine items

Purchase Full List

This page displays comprehensive details about the purchase order created.

This page is to display complete software details of purchase orders.

Total Purchased Quantity	4
Total Purchased Cost	0.00

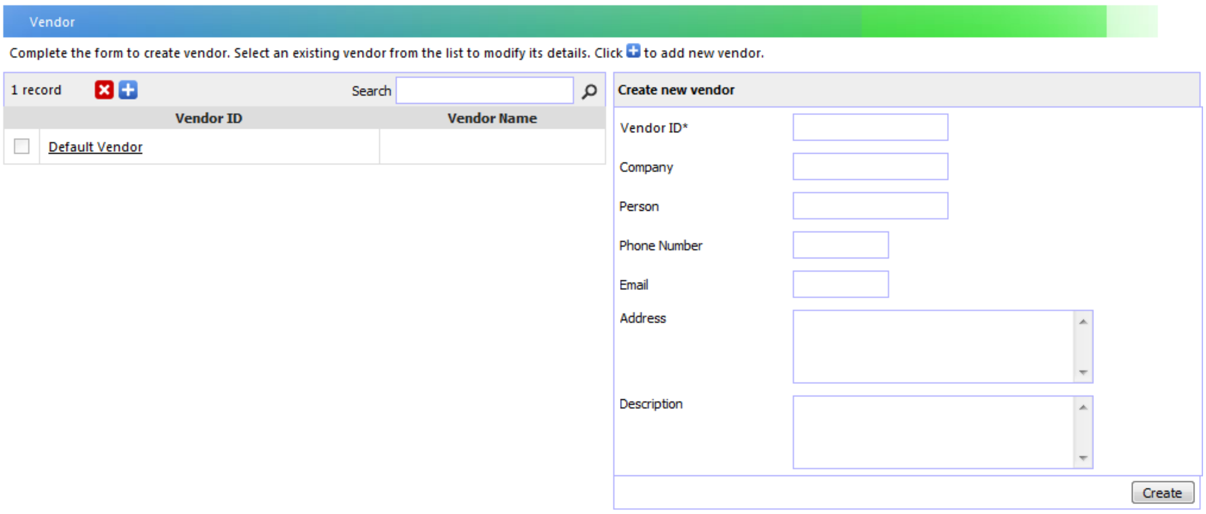
6 records

PO Number	Display Name	Quantity	Cost per unit	License Type	Support Expiry Date
PO11111	Microsoft Office Professional Plus 2010	0	0.00	Default	Never
PO11111	Microsoft Office Project Professional 2007	0	0.00	Default	Never
PO2010030201	SAMLite 5.0	1	0.00	Default	6/11/2010
PO2010030201	Microsoft Office Enterprise 2007	1	0.00	Default	Never
PO2010030201	Microsoft Office Professional Plus 2010	1	0.00	Default	Never
PO2010030201	Microsoft Office Project Professional 2007	1	0.00	Default	Never

From this page, user can click on the PO Number which opens up another window with full details information of the click PO number. If user clicks on the Display Name it will show user of the details information of the software.

New Vendor

This is where user creates a list of vendor. This will be available for purchase order creation.

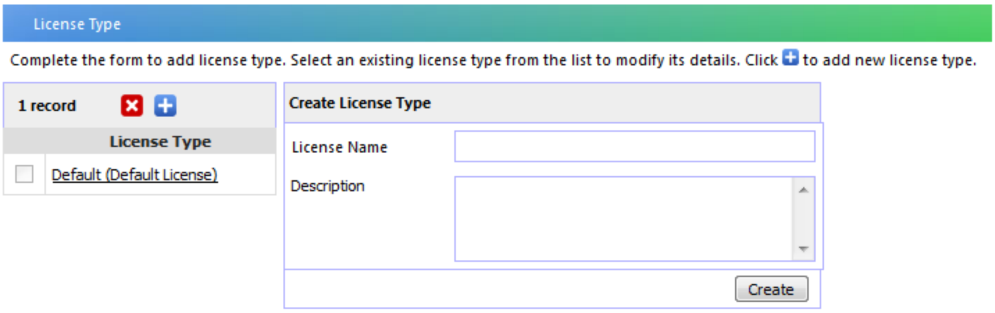


Field Name	Description
Vendor ID	Unique ID for vendor. This field is compulsory
Company	Vendor’s Company. Normally is same as Vendor Unique ID. If you change the ID, the company will be changed as well
Person	Person/Vendor’s Name
Phone Number	Vendors’ Contact Number
Email	Vendor’s Email Address
Address	Vendor’s Company Address/Personal Address

Description	Additional notes for current vendor

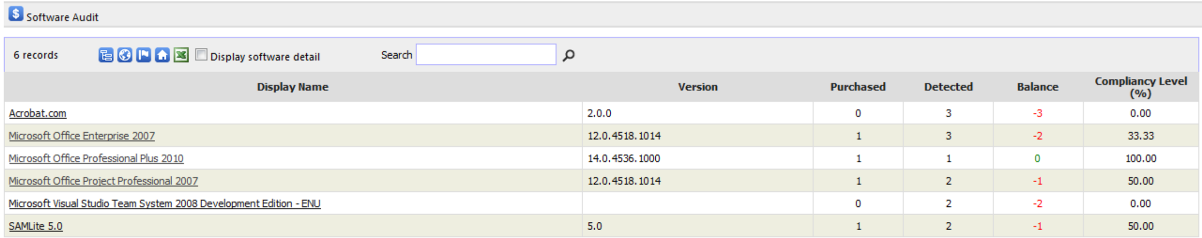
License Type

This is where user creates types of license. This will be available for purchase order creation.



Reconciliation

Software Reconciliation


Software Audit

6 records Display software detail Search

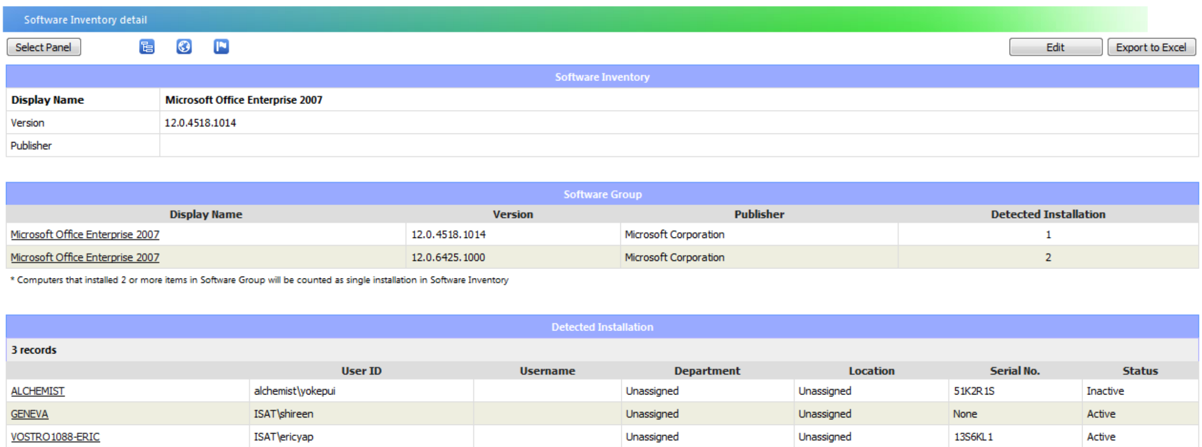
Display Name	Version	Purchased	Detected	Balance	Compliancy Level (%)
Acrobat.com	2.0.0	0	3	-3	0.00
Microsoft Office Enterprise 2007	12.0.4518.1014	1	3	-2	33.33
Microsoft Office Professional Plus 2010	14.0.4536.1000	1	1	0	100.00
Microsoft Office Project Professional 2007	12.0.4518.1014	1	2	-1	50.00
Microsoft Visual Studio Team System 2008 Development Edition - ENU		0	2	-2	0.00
SAMLite 5.0	5.0	1	2	-1	50.00

Software Reconciliation is to identify the licensing gaps and compliancy level of software.

Column Name	**Description**
Display Name	Name of Software, together with Version.
Purchased	Total purchased unit of software
Detected	Number of machines that detected software installation
Balance	Purchase Balance. Value in red means Under Purchase while Value in Blue means over purchased.
Compliancy	Compliancy level. It is to determine the percentage between Purchases and detected installation. If the purchase has more then or equal to installation, the percentage will be displayed as 100.00%

Click a software name from the list to display details of selected software.

Figure below show the details when software name is clicked:l


Software Inventory detail

Select Panel Edit Export to Excel

Software Inventory

Display Name	**Microsoft Office Enterprise 2007**
Version	12.0.4518.1014
Publisher	

Software Group

Display Name	Version	Publisher	Detected Installation
Microsoft Office Enterprise 2007	12.0.4518.1014	Microsoft Corporation	1
Microsoft Office Enterprise 2007	12.0.6425.1000	Microsoft Corporation	2

* Computers that installed 2 or more items in Software Group will be counted as single installation in Software Inventory

Detected Installation

3 records

	User ID	Username	Department	Location	Serial No.	Status
ALCHEMIST	alchemist\yokepui		Unassigned	Unassigned	51K2R1S	Inactive
GENEVA	ISAT\shireen		Unassigned	Unassigned	None	Active
VOSTRO1088-ERIC	ISAT\ericyap		Unassigned	Unassigned	13S6KL1	Active

Machine Reconciliation

Machine Summary Machine Audit

Detected Machine	6
Recorded Machine Purchase	2 (33.33 %)

2 records Search

Computer Name	User ID	Username	Department	Location	Serial Number	Purchase Order	Product ID	Lease Expiry Date	Warranty Expiry Date
ALCHEMIST	alchemist\yokepui		Unassigned	Unassigned	51K2R1S	PO11111		Never	Never
ELECTRA	ISAT\eddytan		Unassigned	Unassigned	C8ZT8K1	PO11111		Never	Never

Machine reconciliation is to check Lease Expiry Date and Warranty date of machines. It is also to check the purchase information of the machines.

Column Name	Description
Computer Name	Display Computer Name
Username	Name of the user who owns the machine
Department	Department of machines
Location	Where machines is located
Serial Number	Machines' serial number
Lease Expiry date	Lease Expiry date
Warranty Expiry Date	Warranty Date
Purchase Order	Purchase information that already bound to machine
Product ID	Recorded Product ID from PO

Software Authorization

- Authorization List
- Authorization History
- Add Authorization
- Remove Authorization
- Upload Authorized Software List

Authorization List

New Authorization Remove Authorization

6 records Display software Search

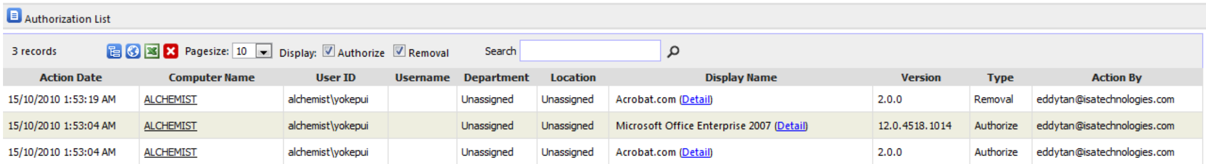
Display name	Version	Detected	Authorized	Unauthorized	Pending Installation	Pending Removal	Complete
Acrobat.com	2.0.0	3	0	3	0	0	0
Microsoft Office Enterprise 2007	12.0.4518.1014	3	0	3	0	0	0
Microsoft Office Professional Plus 2010	14.0.4536.1000	1	0	1	0	0	0
Microsoft Office Project Professional 2007	12.0.4518.1014	2	0	2	0	0	0
Microsoft Visual Studio Team System 2008 Development Edition - ENU		2	0	2	0	0	0
SAMLite 5.0	5.0	2	0	2	0	0	0

This page will show user of a list of purchased software detected, number of software authorized for use, number of software unauthorized for use, number of software pending installation, number of software pending removal because of unauthorized usage and number of software completed removing using unauthorized software.

When software name is clicked, user will be able to see machines list detected with this software, which are the machines has authorization and unauthorization.

Authorization History

This page is to store the records that you have done new authorization and remove authorization.


Authorization List

3 records Pagesize: 10 Display: Authorize Removal Search

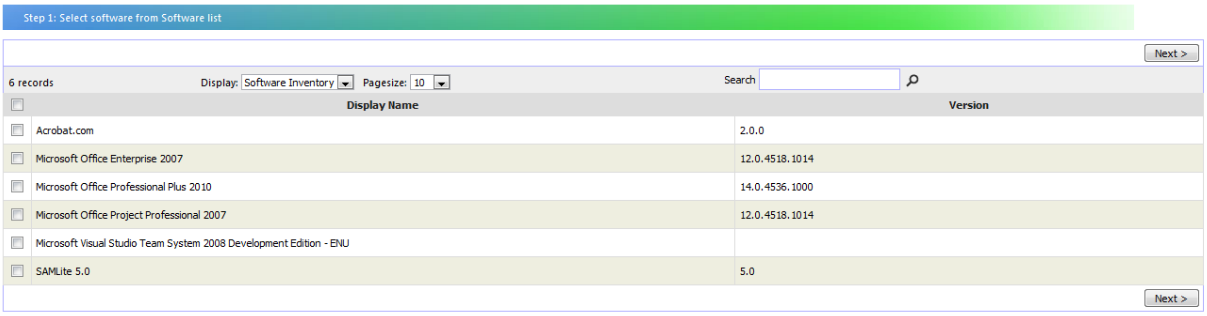
Action Date	Computer Name	User ID	Username	Department	Location	Display Name	Version	Type	Action By
15/10/2010 1:53:19 AM	ALCHEMIST	alchemist\yokepui		Unassigned	Unassigned	Acrobat.com (Detail)	2.0.0	Removal	eddytan@isatechnologies.com
15/10/2010 1:53:04 AM	ALCHEMIST	alchemist\yokepui		Unassigned	Unassigned	Microsoft Office Enterprise 2007 (Detail)	12.0.4518.1014	Authorize	eddytan@isatechnologies.com
15/10/2010 1:53:04 AM	ALCHEMIST	alchemist\yokepui		Unassigned	Unassigned	Acrobat.com (Detail)	2.0.0	Authorize	eddytan@isatechnologies.com

Item/Column	Description
Action Date	Date when authorization is given or removes.
Computer Name	Machine hostname.
User Id	Id of the user for the machine.
Username	The name of the user for the machine.
Department	Machine's Department
Location	Where is this machine located
Display Name	Software Name
Version	Software version
Type	Show what type of authorization been conducted, **Authorize** or **Removal**
Action By	User that made this action to give authorization or to remove authorization

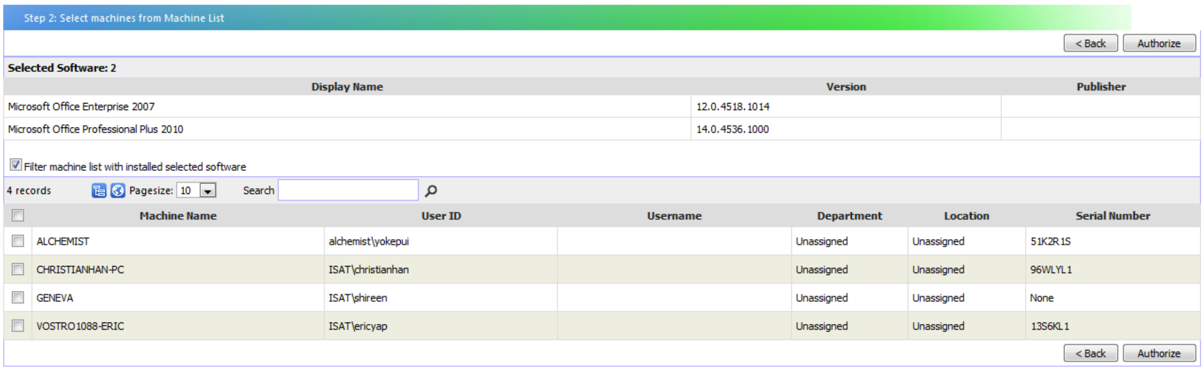
Add Authorization

1. This page is to authorize to allow software installation of machines. There are 2 steps in this page:

   a. Select software



   b. Select machine

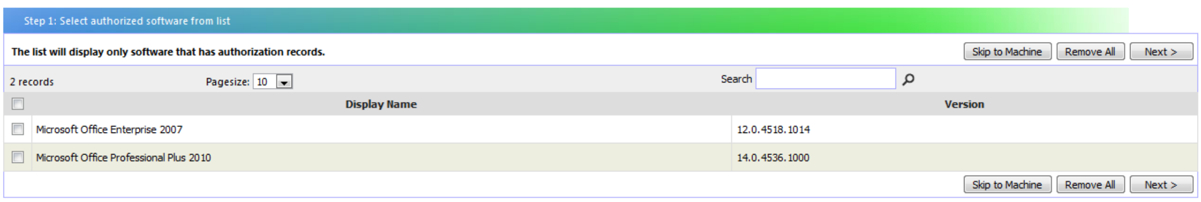


2. Click “Authorize”. Now you have added authorization.

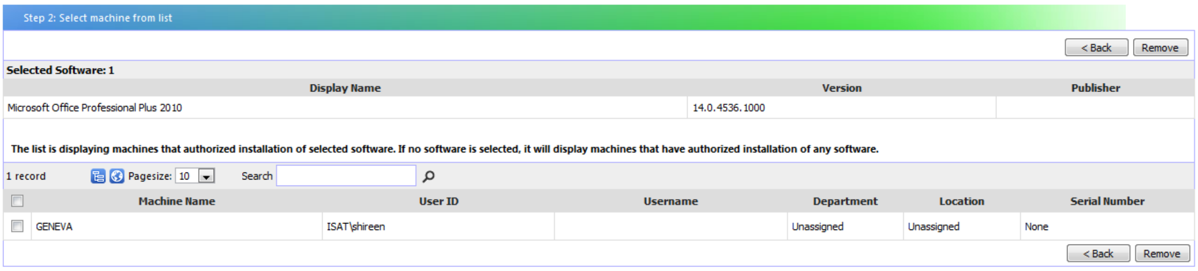
Remove Authorization

1. This page is to remove authorization of the software installation. There are 2 steps in this page:

   a. Select a machine



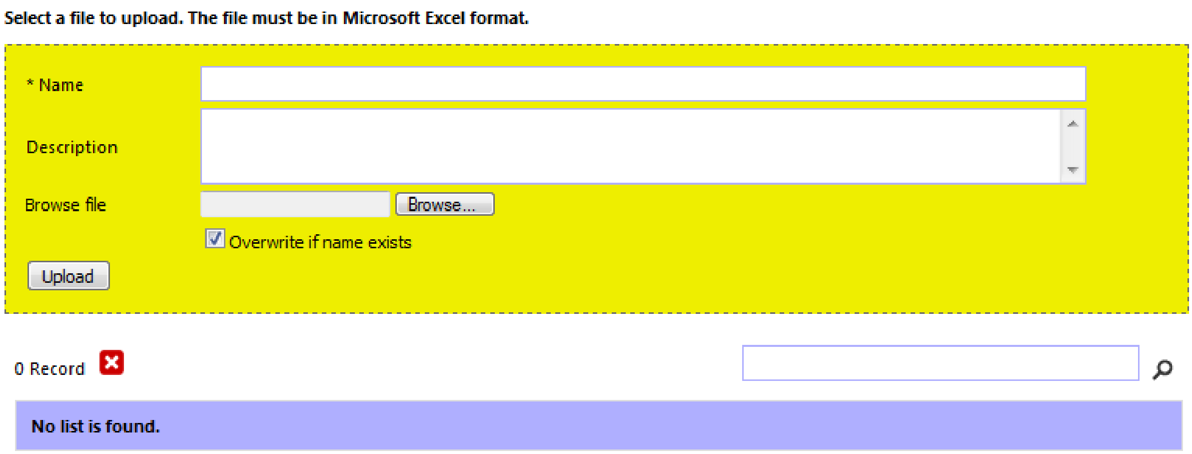
b. Select software



2. Click on "Remove". Now authorization is already remove.

Upload Authorize Software List

This page allows users to import a list of Authorized Software into justSAMit using Microsoft Excel format.



Software Bind

This page is to bind the purchased software to software installation. The purpose is to link a few details from purchase to the installed software on machines such as cost, support expiry date. It is to determine the exact amount of purchased software quantity that already being used.

When you bind the purchase to installation, all selected installation will be set to authorize to use the software.

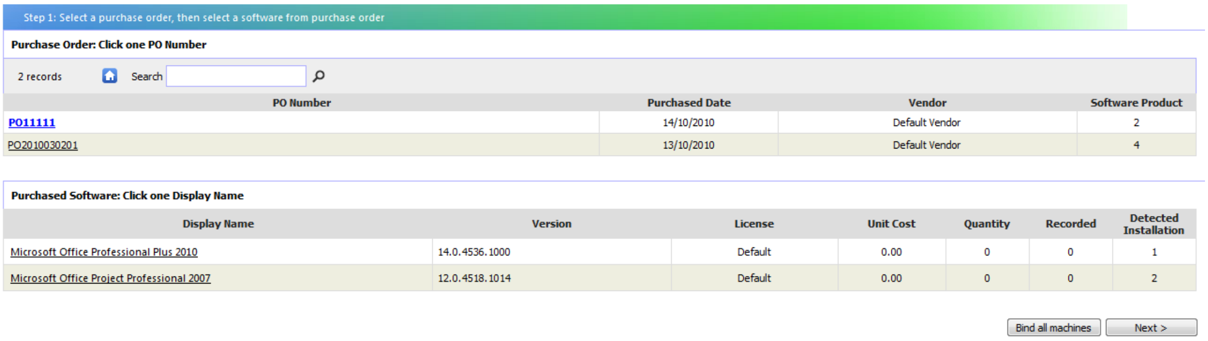
Pre-requisite:

- At least 1 purchased software
- Users must have the following rights:
  - License Purchase Moderator
  - License Authorization Moderator

There are 2 steps in this page:

1) Select a purchased software
2) Select machines that detected installation

In Step 1, you need to select PO Number and select a software you would like to bind them.



Step 1: Select a purchase order, then select a software from purchase order

Purchase Order: Click one PO Number

2 records Search

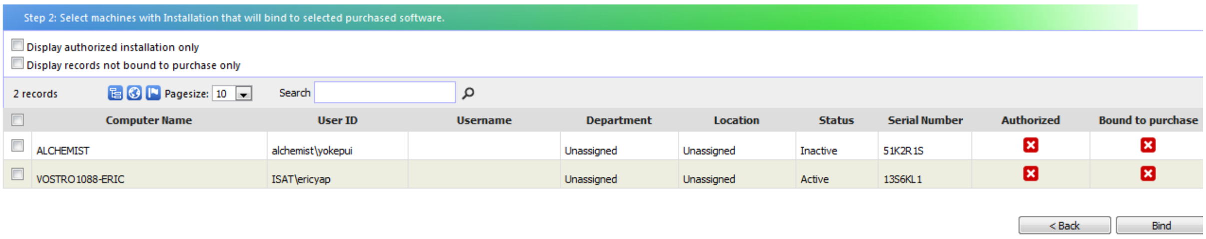
PO Number	Purchased Date	Vendor	Software Product
PO11111	14/10/2010	Default Vendor	2
PO20100030201	13/10/2010	Default Vendor	4

Purchased Software: Click one Display Name

Display Name	Version	License	Unit Cost	Quantity	Recorded	Detected Installation
Microsoft Office Professional Plus 2010	14.0.4536.1000	Default	0.00	0	0	1
Microsoft Office Project Professional 2007	12.0.4518.1014	Default	0.00	0	0	2

Bind all machines Next >

In Step 2, select machines to bind with selected software done in step 1



Step 2: Select machines with Installation that will bind to selected purchased software.

Display authorized installation only
Display records not bound to purchase only

2 records Pagesize: 10 Search

	Computer Name	User ID	Username	Department	Location	Status	Serial Number	Authorized	Bound to purchase
	ALCHEMIST	alchemist\yokepui		Unassigned	Unassigned	Inactive	51K2R1S		
	VOSTRO1088-ERIC	ISAT\ericyap		Unassigned	Unassigned	Active	13S6KL1		

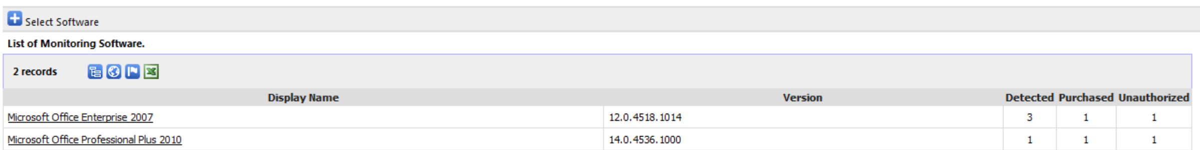
< Back Bind

After you have done, click “**Bind**”

Note: If selected machines have already bound to purchase, a confirmation page will be displayed. Click Confirm to change the Software Purchase of notified machines.

Software Monitor

Allows user to manage and monitor software that really interest them.



Select Software

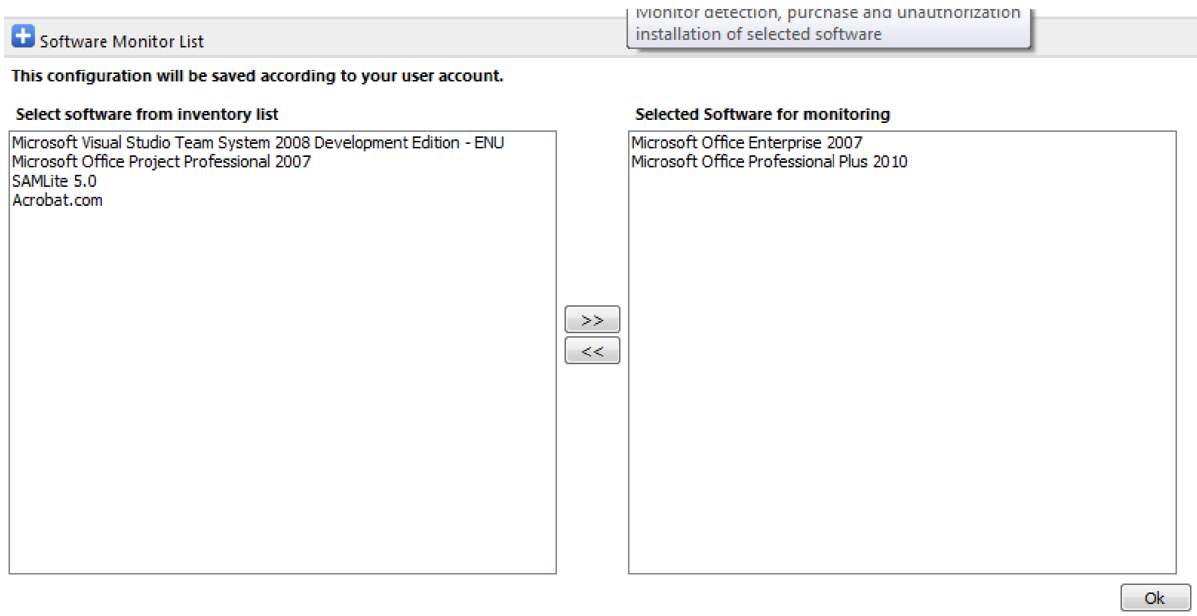
List of Monitoring Software.

2 records

Display Name	Version	Detected	Purchased	Unauthorized
Microsoft Office Enterprise 2007	12.0.4518.1014	3	1	1
Microsoft Office Professional Plus 2010	14.0.4536.1000	1	1	1

In this page, user will only see software they want to monitor; other unnecessary software will be excluded from the list.

In order to add more software to be monitored into the list, click on “**Select Software**”. Figure below show the list of software available, this software is software already purchased by user.



Here are the steps to add software:

1. Click on Select Software and it will lead you to a page where you can select software from a list.
2. Select the software title from the **left** pane, and then click >> .
3. The selected software will be added to the right pane.

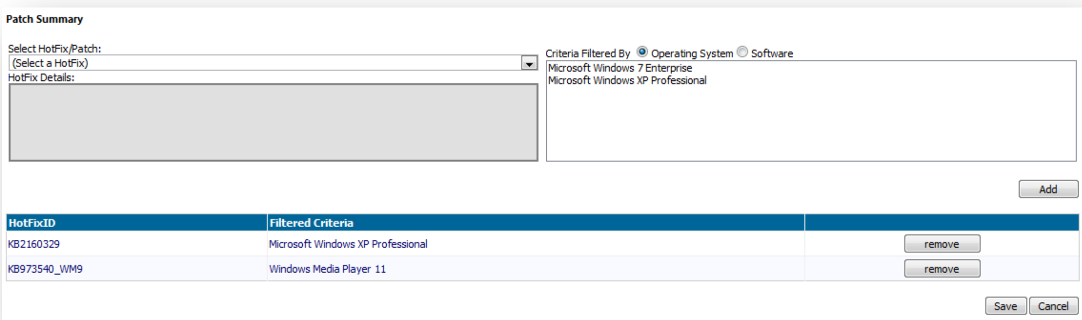
Here are the steps to remove software:

1. Select the software title from the **right** pane, and then click << .
2. The removed software will be moved back to the left pane.

Click "Ok" button to save your changes and exit the page.

Patch Monitor

Allows user to manage and monitor patch/hotfix that is important.



Here are the steps to add hotfix:

1. Select the hotfix name from the “Select a Hotfix” **drop down list**.
2. The selected hotfix will be shown at the left pane.
3. Select either **operating system** or **software** that is required to be installed with the selected software at the **right pane**.
4. Click “Add” button to add the selected hotfix to the monitoring list.

Here are the steps to remove hotfix:

1. Click “Remove” button of the selected hotfix.
2. The monitoring list will be updated immediately.

Click “Save” button to save your changes and exit the page.