

Cloud Console

User Guide

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CLOUD CONSOLE OVERVIEW

License Dashboard Cloud Console is an online tool which allows you to view your organization's licensing data at any time and place, through the web. This is a view only access to licensing data, which is still maintained in the License Manager application.

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Key features of Cloud Console

- A series of [Notifications](#) to provide an overview of the License Manager database and highlight items which require attention.
- Full [Executive Summary](#) view facilities with interactive charts to explore and generate downloadable images of the data.
- A comprehensive list of interactive [Reports](#) with export options for further data manipulation.
- A customizable interface with user and role [Administration](#).

About the Application

Cloud Console is a web based application which does not need to be installed locally on any device. Cloud Console is only available in the English language.

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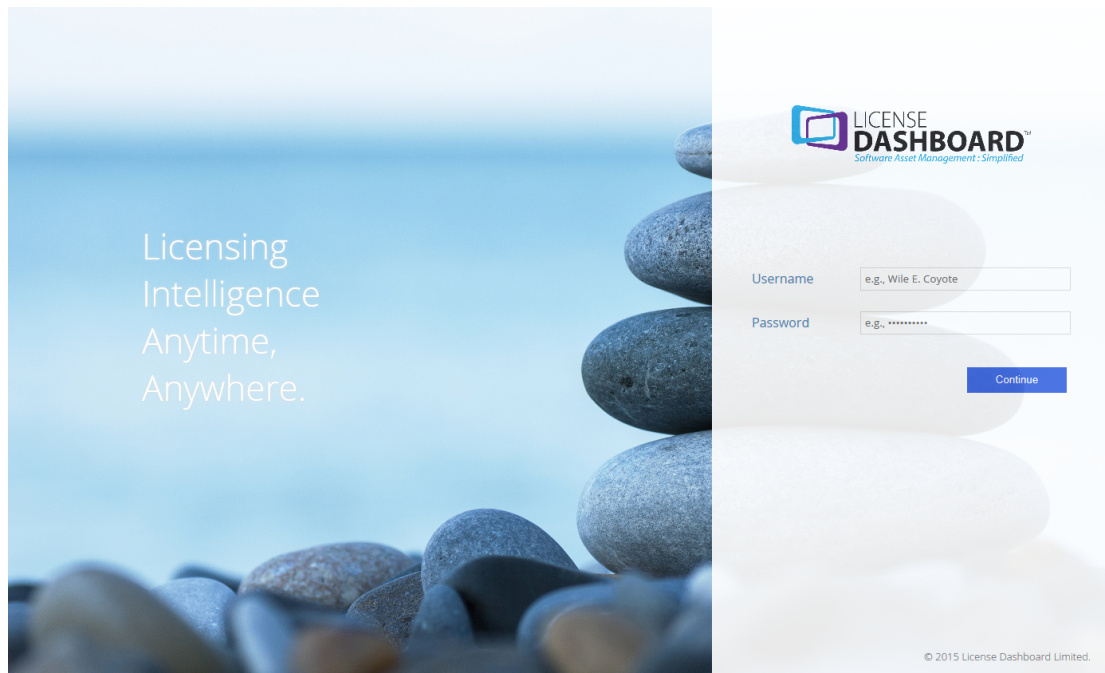
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How to Navigate Cloud Console

Accessing Cloud Console

is a web based application. It must be accessed using Internet Explorer.

The URL for accessing is created when the system is installed on your server. This is unique to your organization. The URL will direct you to a login page:



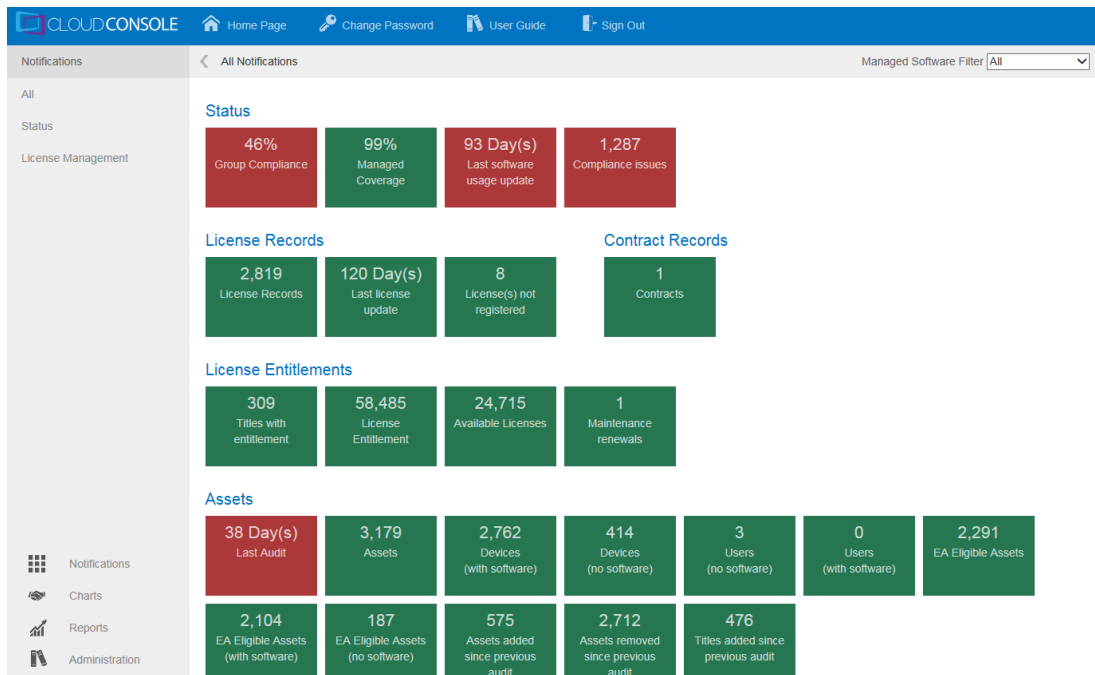
Users must have a user account to access .

1. Type the **Username** for your account
2. Type the **Password** for your account
3. Click **Continue** to log in to Cloud Console

Note: User accounts are managed by a system administrator in your organization. Please contact your system administrator to set up your user account or reset your password. The [Administration workspace](#) is used to manage the user accounts for your organization. The login URL should also be provided by your system administrator. This can be bookmarked in your browser to provide a quick link to Cloud Console.

Cloud Console Interface

When you log in to Cloud Console for the first time, the home page is displayed:



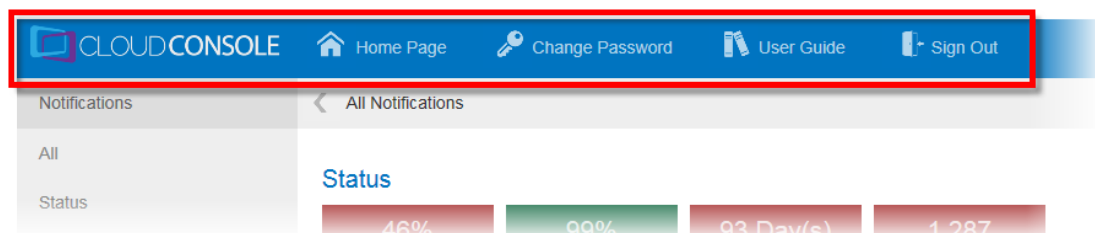
This page is the [Notifications workspace](#) for Cloud Console.

The Cloud Console interface is split into three sections:

- Toolbar
- Navigation menu
- Workspace

Toolbar

The toolbar provides access to additional functions in the Cloud Console application. This is always available at the top of the web page:



There are four functions:

- Home Page. Click **Home Page** or the Cloud Console logo to return to the Home Page
- Change Password. [See: How to change your password](#)
- User Guide. Click **User Guide** to open this user guide
- Sign Out. Click **Sign Out** to sign out of Cloud Console and return to the login page

How to change your password

The change password function allows you to change the password for your account.

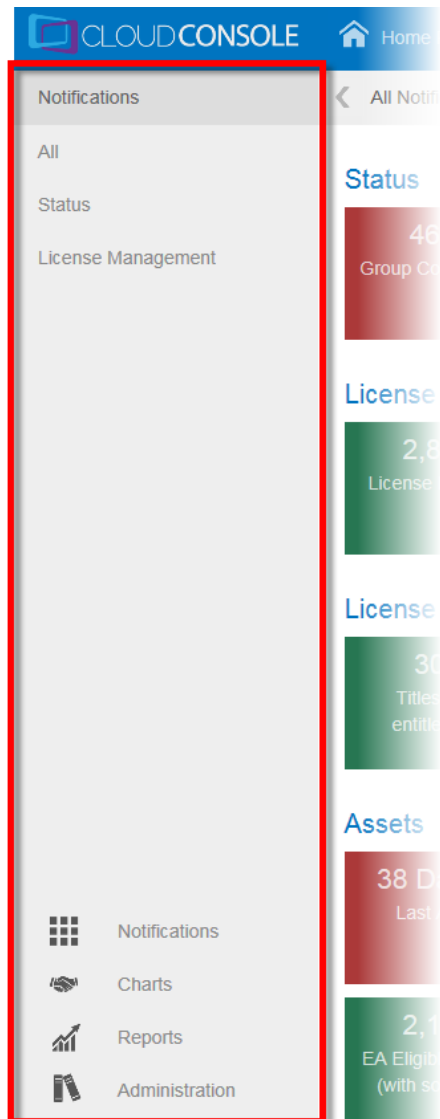
Note: If you need to change your password because are unable to log in, please contact your system administrator.

1. Click **Change Password** in the toolbar. The change password page is displayed

2. Type the **New Password** for your account
3. Type the same password in the **Confirm New Password** field
4. Click **Update**. The new password is saved

Navigation Menu

The navigation menu provides access to the workspaces and the workspace navigation features of Cloud Console.



Links to the workspaces in Cloud Console are always available at the bottom of the menu. The options available are related to your access rights.

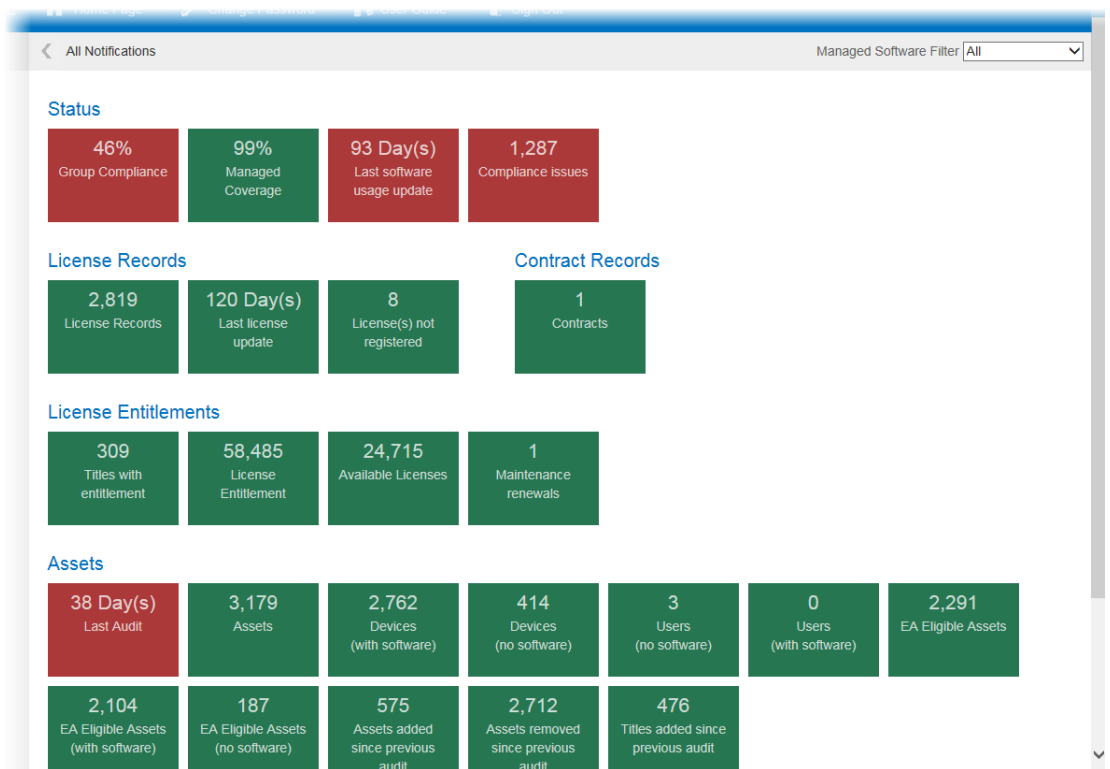
Workspace navigation links are displayed at the top of the menu. The options available are related to the workspace you are viewing and your access rights.

Workspaces

There are four workspaces in Cloud Console. Each workspace provides different tools for managing licensing compliance.

Click a link in the menu at the bottom left of the navigation menu to access the workspace:

- The [Notifications workspace](#) displays a summary of the organization's license data and recent activity in License Manager:



- The [Executive Summary workspace](#) contains a series of charts representing the data in the License Manager database:



- The [Reports workspace](#) contains a series of interactive reports representing the data in License Manager and :

← Licenses - License Records - All Records CSV

Business Unit Grouped ☒ Country Environment

License ID	Manufacturer	Product	Vers...	License	License Metric	License Model
<input type="text" value="▽ Equals..."/>	<input type="text" value="▽ Contains..."/>	<input type="text" value="▽ Contains..."/>	<input type="text" value="▽ Contain..."/>	<input type="text" value="▽ Contains..."/>	<input type="text" value="▽ Contains..."/>	<input type="text" value="▽ Contains..."/>
1897	Adobe	Acrobat Distiller	5.0	Acrobat Distiller 5.0 MLP AOO License IE NT/UNIX	Device	License Only
1949	Adobe	Acrobat Distiller	5.0	Acrobat Distiller 5.0 MLP AOO License IE NT/UNIX	Device	License Only
1950	Adobe	Acrobat Distiller	5.0	Acrobat Distiller 5.0 MLP AOO License IE NT/UNIX	Device	License Only
1972	Adobe	Acrobat Distiller	6.0	Acrobat Distiller 6.0 WIN AOO License IE 100PK...	Device	License Only
1901	Adobe	Acrobat Distiller	6.0	Acrobat Distiller 6.0 WIN AOO License IE 100PK...	Device	License Only
1903	Adobe	Acrobat Distiller	6.0	Acrobat Distiller 6.0 WIN AOO License IE 100PK...	Device	License Only
1926	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1928	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1933	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1874	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1419	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1612	Adobe	Acrobat Professio...	6.0	Acrobat Pro 6.0	Device	License Only
1613	Adobe	Acrobat Professio...	7.0	Acrobat Pro 7.0	Device	License Only
1782	Adobe	Acrobat Professio...	7.0	Acrobat Professional 7.0 WIN AOO License IE	Device	License Only
1806	Adobe	Acrobat Professio...	7.0	Acrobat Professional 7.0 WIN AOO License IE	Device	License Only

1 - 25 of 2819 records ← prev Pg 1 of 113 next → Show 25 records

- The [Administration workspace](#) is used to manage access to the and adjust the system settings:

Home Page Change Password User Guide Sign Out

← Users

	Login ID	Display Name	Email	Job Title	Base...	Admin...	En...	Lock...	Last L...	Expiry...
<input type="button" value="Edit"/> <input type="button" value="Password"/> <input type="button" value="Delete"/>	<input type="text" value="▽ Contains..."/>	<input type="text" value="▽ Contains..."/>	<input type="text" value="▽ Contains..."/>	<input type="text" value="▽ Contains..."/>	<input type="text" value="▽ Contains..."/>	<input type="text" value="▽ "/>	<input type="text" value="▽ "/>	<input type="text" value="▽ "/>	<input type="text" value="▽ On..."/>	<input type="text" value="▽ On..."/>
	Administrator	Administrator				Yes	Yes	No	5/14/2016	

1 - 1 of 1 records ← prev 1 next → Show 25 records

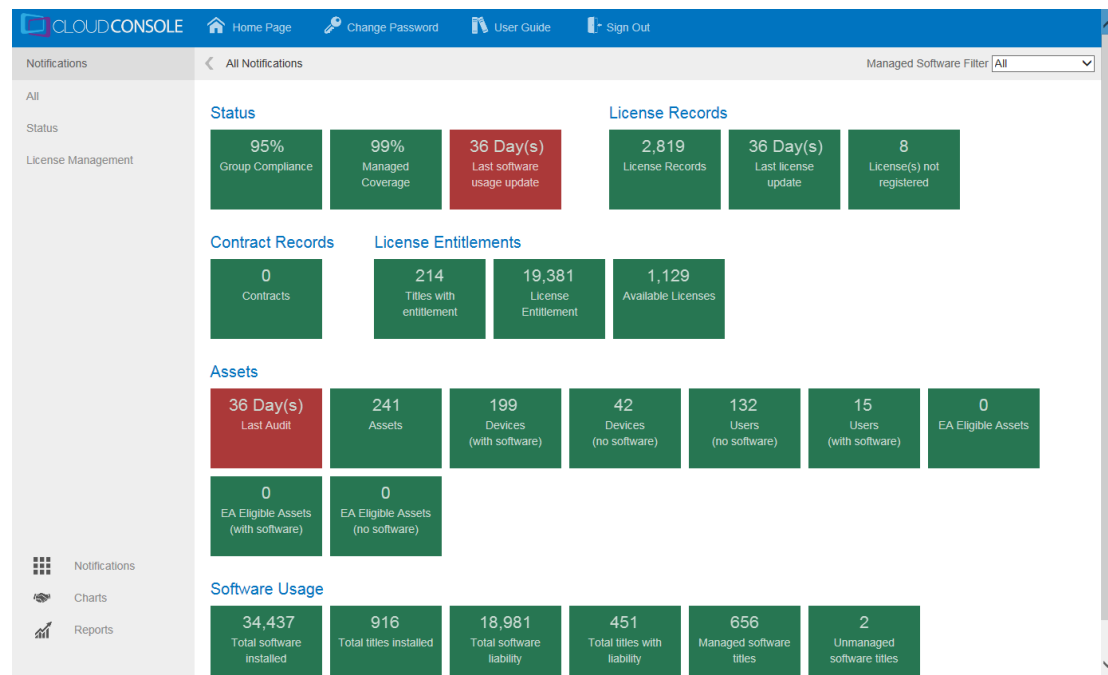
[Add New User](#)

Notifications

The notifications workspace in Cloud Console provides a series of notifications about the licensing for your organization. This is based on the current information in your License Manager database.

The notifications show a summary of the licensing data for your organization. They are designed to give you a brief overview of your current license compliance and highlight any areas which require action.

Click **Notifications** in the navigation menu to access the notifications page.



The notifications are split into multiple categories.

- [Status Notifications](#) show the current status of License Manager and recent user activity in the License Manager database
- [License Records Notifications](#) show an overview of the license records workspace in License Manager. This includes any recent activity
- [Contract Records Notifications](#) show an overview of the contract records workspace in License Manager
- [License Entitlements Notifications](#) show an overview of the license entitlement workspace in License Manager
- [Assets Notifications](#) show an overview of the assets workspace in License Manager.
- [Software Usage Notifications](#) show an overview of the software usage workspace in License Manager
- [Software Metering Notifications](#) show an overview of software metering data in License Manager

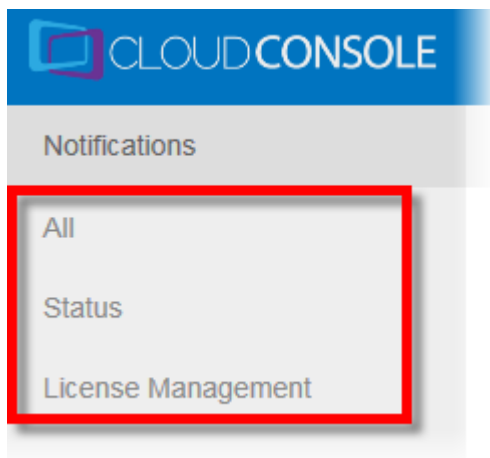
Notifications are color coded to highlight areas which need attention.

- Green notifications represents data which does not require action
- Yellow notifications represents data which may require action
- Red notifications represents data which requires urgent action

How to Navigate Notifications

Filters

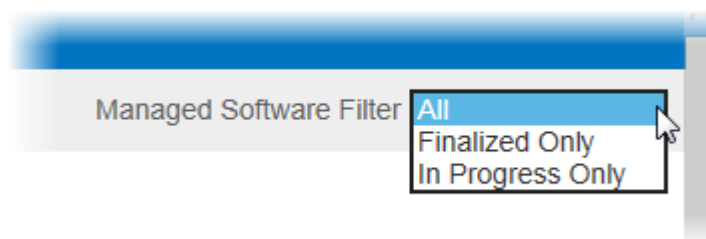
Additional filters are available in the navigation menu:



Click a filter to display its associated notifications.

- Click **All** to display all notifications
- Click **Status** to display the [Status](#) notifications
- Click **License Management** to display the [License Records](#), [Contract Records](#), [License Entitlements](#), [Data Cleanse](#), [Software Usage](#) and [Software Metering](#) notifications

The managed software filter is available in the notifications workspace:



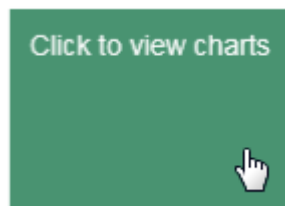
Click a filter to restrict the data displayed in the notifications.

- Click **All** to display the unfiltered notifications
- Click **Finalized Only** to filter the data in the notifications to include only managed software which has been finalized
- Click **In Progress Only** to filter the data in the notifications to include only non-managed software which is in progress

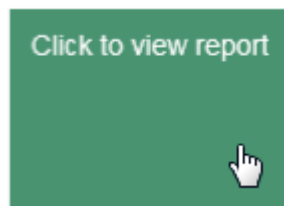
Notification options

Hover the mouse pointer over a notification for additional information. The notification shows additional information:

- Charts. This is displayed if there is a link to a chart which provides additional information regarding the notification:



- Click the notification to launch the chart. The chart is displayed in the [Charts workspace](#)
- Report. This is displayed if there is a link to a report which provides additional information regarding the notification:



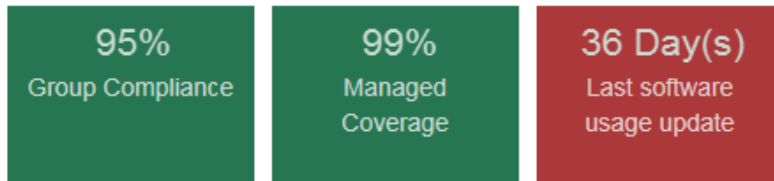
- Click the notification to launch the report. The report is displayed in the [Reports workspace](#)
- Info. A description of the notification is displayed if there is no associated link:



Status Notifications

Status Notifications show the current status of License Manager and recent user activity in the Cloud Console database.

Status



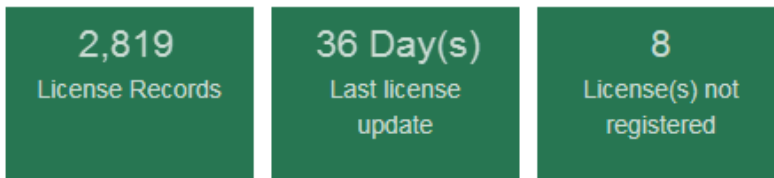
There are up to four status notifications.

- The group compliance notification shows the overall compliance for the selected business unit and its child business units. Click **Group Compliance** to view the [Compliance Charts page](#)
- The managed coverage notification shows the percentage of products in the software usage workspace which have been accepted as managed software. Click **Managed Coverage** to launch the [Managed Coverage Detail report](#)
- The last software usage update notification shows the number of days since software usage data was committed in the assets workspace
- The compliance issues notification shows the number of non-compliant software usage items. Click **Compliance issues** to launch the [Compliance Summary - Compliance Detail report](#)

License Records Notifications

License records notifications show an overview of the license records workspace in License Manager. This includes any recent activity.

License Records



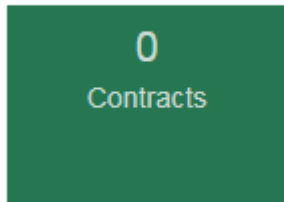
There are five license records notifications.

- The license records notification shows the total number of licenses. Click **License Records** to launch the [License Records - All Records report](#)
- The licenses on order notification shows the number of licenses on order. Click **Licenses on Order** to launch the [License Records - On Order report](#)
- The last license update notification shows the number of days since the license records workspace was last updated
- The licenses not registered notification shows the number of unregistered licenses. Click **License(s) not Registered** to launch the [License Records - All Records report](#)
- The non-specific (no release date) notification shows the number of licenses assigned to products with no release date. Click **Non-specific (no release date)** to launch the [License Records - All Records report](#)

Contract Records Notifications

Contract records notifications show an overview of the contract records workspace in License Manager.

Contract Records



There are two contract records notifications.

- The contracts notification shows the total number of contracts. Click **Contracts** to launch the [Contract Records - All Records report](#)
- The contracts renewals notification shows the total number of contracts due to expire within 90 days. Click **Contract Renewals** to launch the [Contract Records - All Records report](#)

License Entitlements Notifications

License entitlement notifications show an overview of the license entitlement workspace in License Manager.

License Entitlements



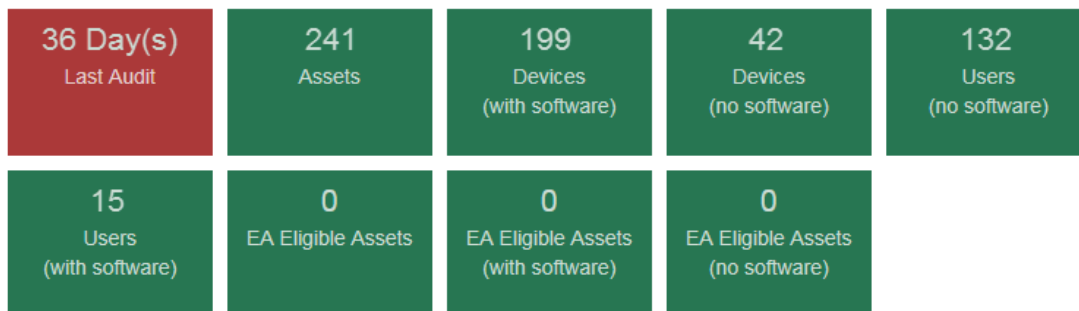
There are five License Entitlement Notifications.

- The titles with entitlement notification shows the total number of products with license entitlement. Click **Titles With Entitlement** to launch the [License Entitlement - Titles with Entitlement report](#)
- The license entitlement notification shows the total license entitlement. Click **License entitlement** to launch the [License Entitlement - Complete report](#)
- The available licenses notification shows unallocated license entitlement. Click **Available Licenses** to launch the [License Entitlement - Available Entitlement report](#)
- The reserved licenses notification shows the total number of licenses that are reserved. Click **Reserved Licenses** to launch the [License Entitlement - Reservations report](#)
- The maintenance renewals notification shows the number of license items where maintenance will expire within 90 days. Click **Maintenance Renewals** to view the [License Entitlement - Maintenance Schedule report](#)
- The maintenance expired notification shows the number of license items where maintenance has expired within the last 30 days. Click **Maintenance expired** to view the [Maintenance Chart page](#)

Assets Notifications

Assets notifications show an overview of the assets workspace in License Manager.

Assets



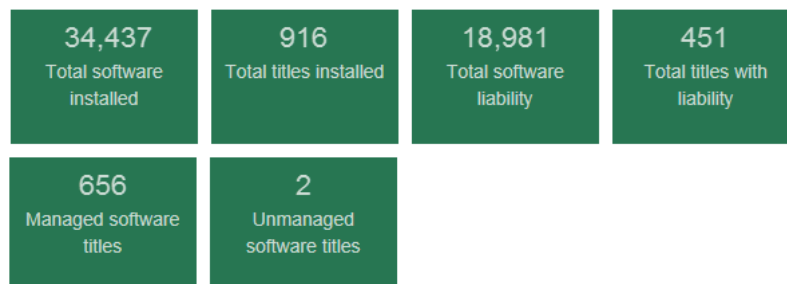
There are thirteen assets notifications.

- The last import notification shows the number of days since the latest data was imported into the assets workspace
- The assets notification shows the number of live assets in the assets workspace. Click **Assets** to launch the [Cleansing - Device Details report](#)
- The devices (with software) notification shows the number of live devices with software installed. Click **Devices (with software)** to launch the [Cleansing - Device Details report](#)
- The devices (no software) shows the number of live devices with no software installed. Click **Devices (no software)** to launch the [Cleansing - Device Details report](#)
- The users (with software) notification shows the number of live users with allocated software. Click **Users (with software)** to launch the [Cleansing - Users report](#)
- The users (no software) notification shows the number of live users with no allocated software. Click **Users (no software)** to launch the [Cleansing - Users report](#)
- The EA eligible assets notification shows the number of assets eligible for the Microsoft EA true-up process. Click **EA Eligible Assets** to launch the [Microsoft EA - Eligible Devices Detail report](#)
- The EA eligible devices (with software) notification shows the number of live devices eligible for the Microsoft EA true-up process with software installed. Click **EA Eligible Devices (with software)** to launch the [Microsoft EA - Eligible Devices Detail report](#)
- The EA eligible devices (no software) notification shows the number of live devices eligible for the Microsoft EA true-up process with no software installed. Click **EA Eligible Devices (no software)** to launch the [Microsoft EA - Eligible Devices Detail report](#)
- The assets added in last n days audit notification shows the number of new assets added in the last n number of days. Click **Assets added in last n days** to launch the [Audit Summary - Change by Device - Detail report](#)
- The titles added in last n days notification shows the number of new products added in the last n number of days. Click **Titles added in last n days** to launch the [Audit Comparison - Change by Installation - Detail report](#)
- The assets removed in last n days audit notification shows the number of assets removed in the last n number of days. Click **Assets added in last n days** to launch the [Audit Summary - Change by Device - Detail report](#)
- The titles removed in last n days notification shows the number of products removed in the last n number of days. Click **Titles added in last n days** to launch the [Audit Comparison - Change by Installation - Detail report](#)

Software Usage Notifications

Software usage notifications show an overview of the software usage workspace in License Manager.

Software Usage



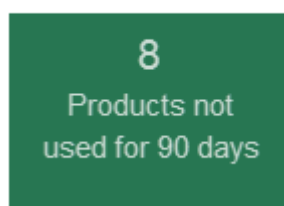
There are nine software usage notifications.

- The total software installed notification shows the total number of items installed. Click **Total Software Installed** to launch the [Software Usage Items - Software Usage Items report](#)
- The total titles installed notification shows the total number of products installed. Click **Total Titles Installed** to launch the [Vendors& Products - Product Version Summary report](#)
- The total software liability notification shows the total number of items with a license liability currently installed. Click **Total software liability** to launch the [Software Usage Items - Software Usage Items report](#)
- The total titles with liability notification shows the total number of products with a license liability currently installed. Click **Total titles with liability** to launch the [Vendors& Products - Product Version Summary report](#)
- The managed software titles notification shows the number of tracked and managed products for the selected business unit and child business units. Click **Managed software titles** to launch the [Software Inventory - Complete report](#)
- The unmanaged software titles notification shows the number of tracked and unmanaged products for the selected business unit and child business units. Click **Unmanaged software titles** to launch the [Software Inventory - Complete report](#)
- The non-tracked products notification shows the number of products which are not tracked. Click **Non-tracked Products** to launch the [Software Inventory - Complete report](#)
- The categorized software notification shows the number of software items for products with a custom category. Click **Categorized Software** to launch the [Software Inventory - Complete report](#)
- The non-standard allocations notification shows the number of non-standard allocations. Click **Non-standard Allocations** to launch the [Audit Partner Reports report](#)

Software Metering Notifications

Software metering notifications show an overview of software metering data in License Manager.

Software Metering



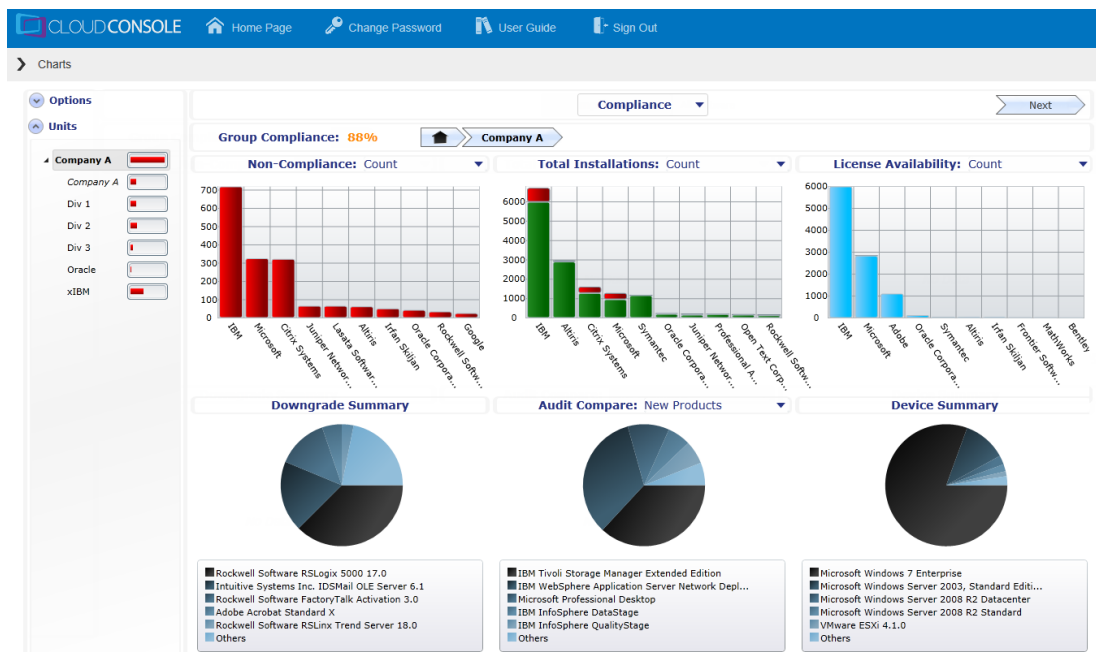
There is one software metering notification.

- The products not used for 90 days notification shows the total number of installed products that have not been used within the last 90 days. Click **Products not used for 90 Days** to launch the [Software Metering - Product Metering Summary report](#)

CHARTS

The charts workspace contains a series of charts representing the data in your License Manager database. This is displayed in the same format as the dashboards workspace in License Manager.

Click **Charts** to access the charts workspace. The [Compliance Charts page](#) is displayed.



Types of chart

The charts workspace can display five different sets of charts.

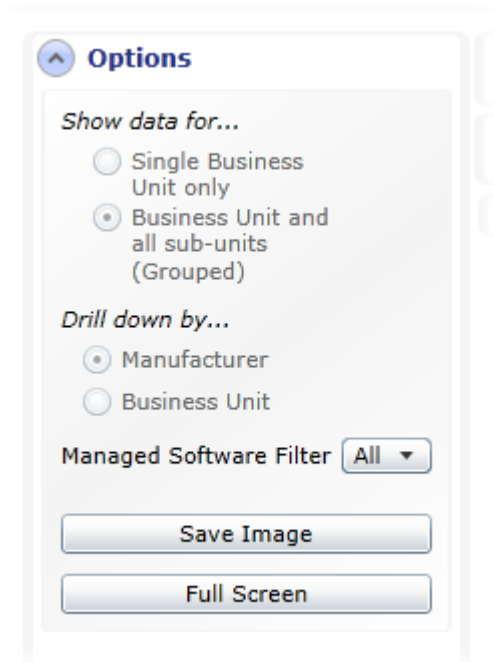
- The [Compliance Charts page](#) contains a series of charts representing your organization's compliance status
- The [Maintenance Chart page](#) shows a timeline for upcoming maintenance license renewals
- The [Metering Charts page](#) shows the usage of products in your organization
- The [Treemap Chart page](#) shows data for the entire organization in an interactive treemap chart
- The [Virtualization Chart page](#) shows the structure of the virtualization environment for the organization

Each dashboard contains different graphical representations of the data held in your License Manager database.

How to Navigate the Charts Workspace

Options

The options menu controls how you interact with the data in the main window.

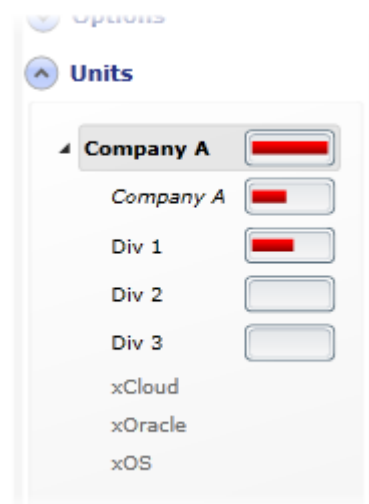


1. The **Show data for...** option controls how the data displayed in the charts is grouped
 - Select **Single Business Unit only** to display data for the selected business unit only
 - Select **Business Unit and all sub-units (Grouped)** to display combined data for the selected business unit and all of its child business units
2. The **Drill down by...** option controls how you drill through the data in the displayed charts
 - Select **Drill down by Manufacturer** to set the top level charts to display by manufacturer.
 - Select **Drill down by Business Unit** to set the top level charts to display by business unit.
This prevents you from combining the data from a parent business unit and its child business units.
3. The managed software filter allows you to restrict the data displayed in the charts
 - Click **All** to display the unfiltered data
 - Click **Finalized Only** to filter the data to include only managed software which has been finalized
 - Click **In Progress Only** to filter the data to include only managed software which is in progress

3. The **Save Image** button allows you to save the current view in the main window as an image file
4. The **Full Screen** button allows you to display the main window in full screen mode.
 - Press escape to return to the normal view

Units

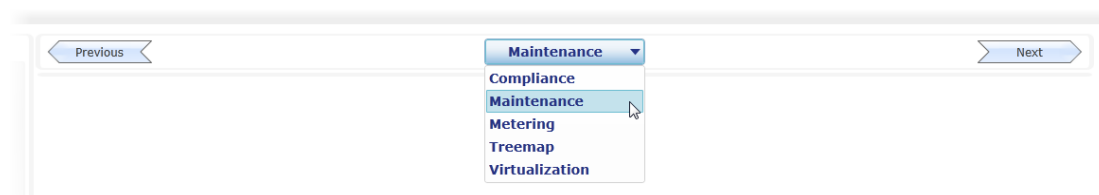
The units menu allows you to choose which business unit's data is displayed in the charts.



Click on a business unit in the list to display data relating to it.

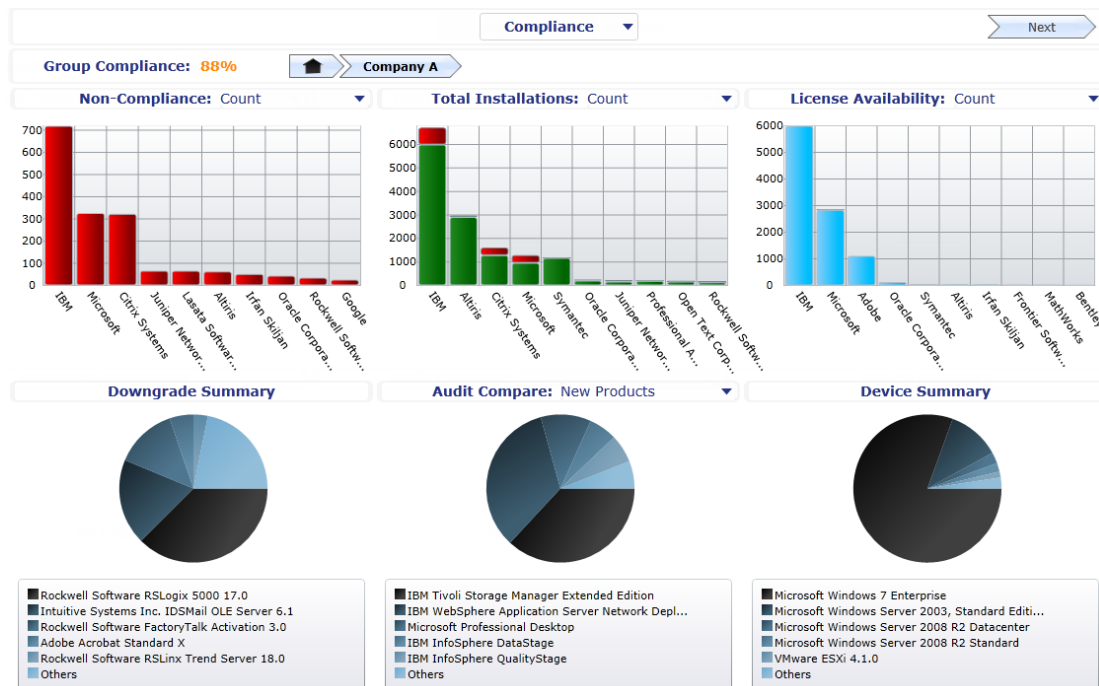
Compliance charts

Use the toolbar at the top of the workspace to switch between different compliance charts. Use the **Previous** and **Next** buttons to navigate to a different compliance chart. You can also use the drop down list in the middle of the window to navigate to a different compliance chart.



Compliance Charts

The compliance charts page contains a series of charts representing your organization's compliance status.

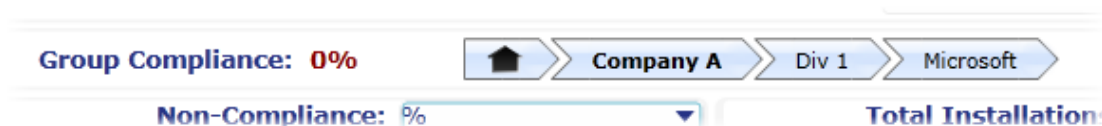


There are six charts in the compliance charts page.

- The [Non-Compliance Chart](#) shows the top non-compliant items
- The [Total Installations Chart](#) shows installation data
- The [License Availability Chart](#) shows the number of available, reserved or ordered licenses
- The [Downgrade Summary Chart](#) shows the products with allocated downgrades
- The [Audit Compare Chart](#) shows differences between the last two fully completed audits
- The [Device Summary by OS Chart](#) shows the number of installed operating systems

How to Navigate the Compliance Dashboard

The breadcrumb trail at the top of the web page shows your current location within the business unit structure.




The above example shows that the compliance charts for **Microsoft** products in the **Div 1** business unit are displayed. Div 1 is a child of **Company A**.

- Click to return to the top level charts.
- Click any to return to a specific level in your business unit structure.

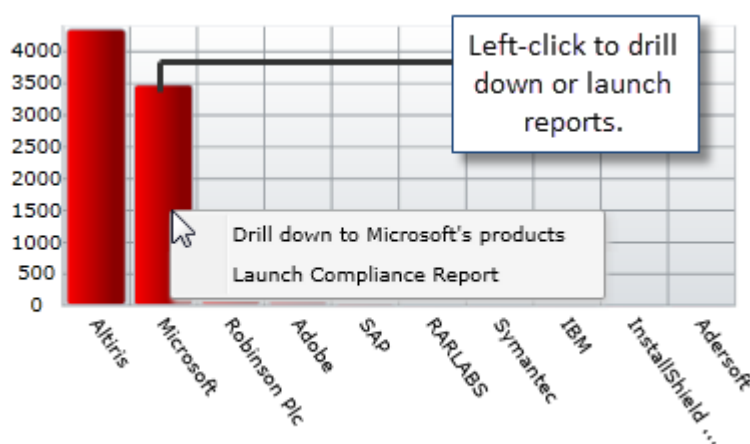
Click on the heading of any chart to view it in the full workspace window.



Click the heading again to return to the full summary page. Alternatively, click  in the breadcrumb trail.

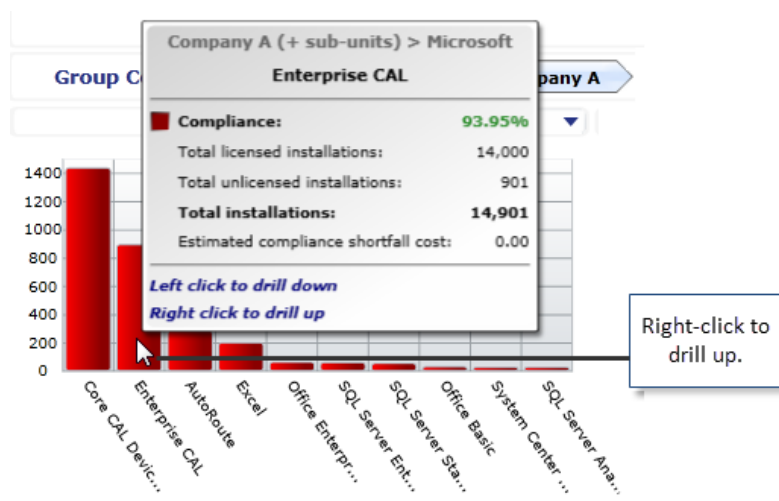
Drilling, zooming and launching reports

Left-click on any column in a chart for drill down and launch report options.

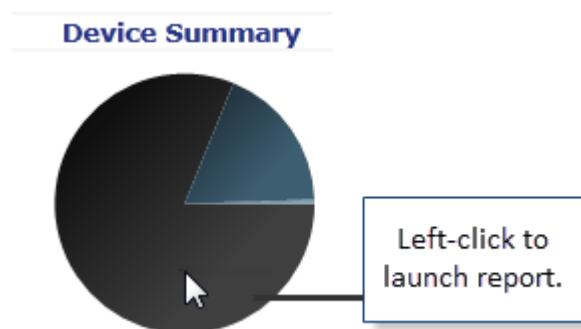


- Click **Drill down to Microsoft's products** to show a chart containing Microsoft's product data
- Click **Launch Compliance Report** to show a [report](#) based on the data in the chart
- The non-compliance chart allows you to launch the [Compliance Summary - Compliance Detail report](#)
- The total installations chart allows you to launch the [Software Inventory - Complete report](#) or the [Software Inventory - by Asset report](#)
- The license availability chart allows you to launch [License Entitlement - Available Entitlement report](#)

Right-click any column to drill back up.



Left-click on any slice in the device summary by OS pie chart to launch the [Cleansing - Device Details report](#) for the operating system.

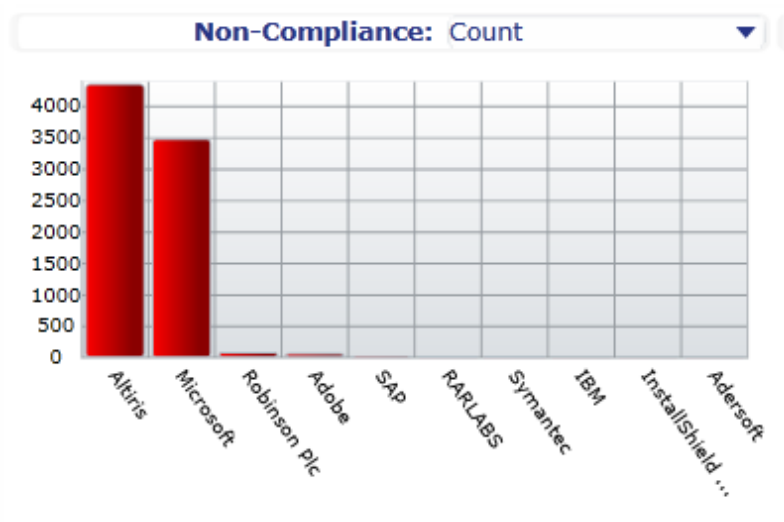


Non-Compliance Chart

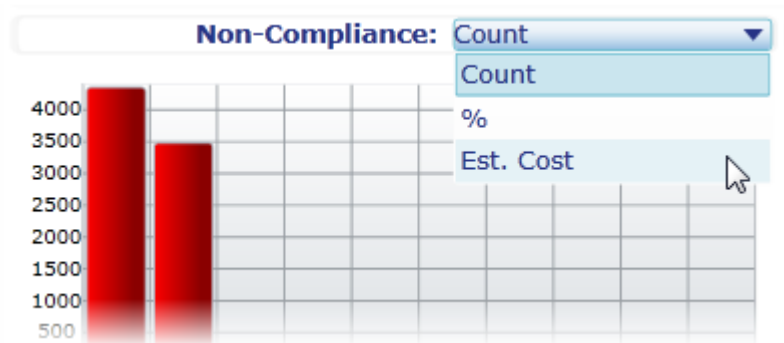
The non-compliance chart shows the top non-compliant items for the selected business unit.

You can drill into the data to show non-compliance by manufacturer, product or product version. You can also launch a [Compliance Summary - Compliance Detail report](#) for each column in the table.

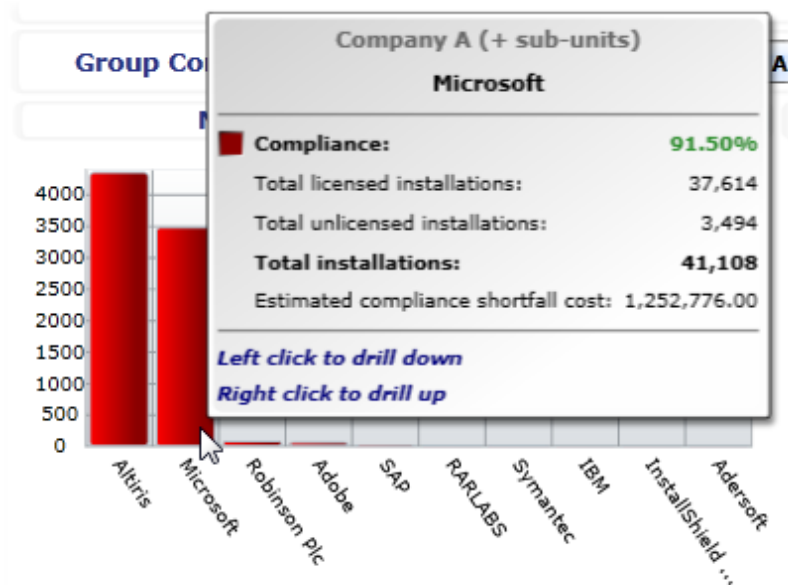
Each column only has one stack and displays the non-compliance status for the labeled item. Columns in non-compliance charts are ordered initially by non-compliance, then by the number of installations.



Non-compliance can be represented as a number count, percentage value or an estimated cost. Click ▼ in the drop-down box above the chart to change the display.



Hover the mouse over any column for further details of the item's compliance status.



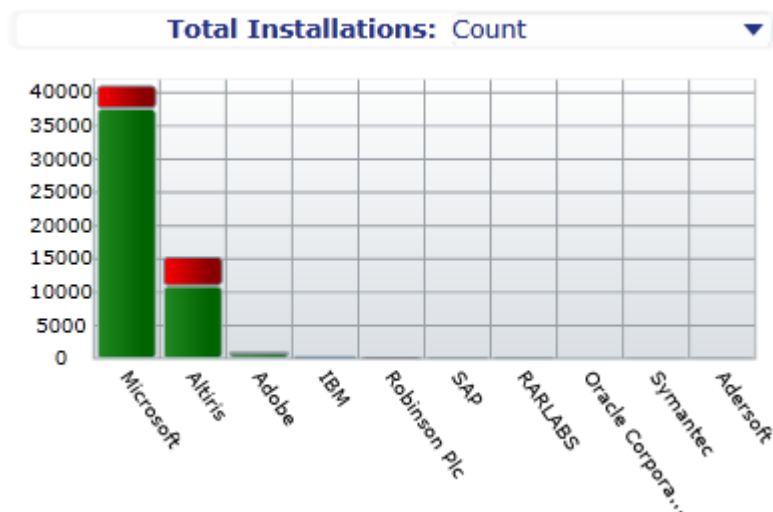
The above pop-up box displays Microsoft compliance data for company A, including its child business units.

Total Installations Chart

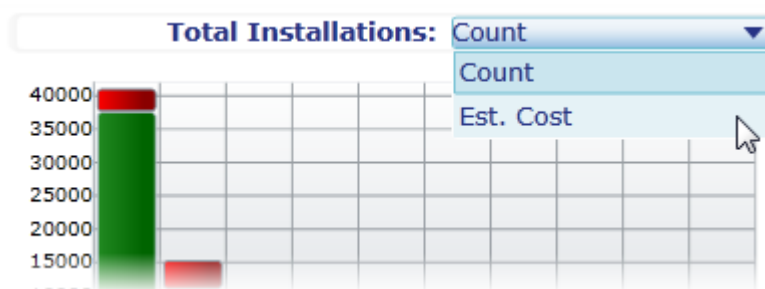
The total installations chart shows the most installed products for the selected business unit.

You can drill into the data to show installations by manufacturer, product or product version. You can also launch a [Software Inventory - Complete report](#) or a [Software Inventory - by Asset report](#) for each column in the table.

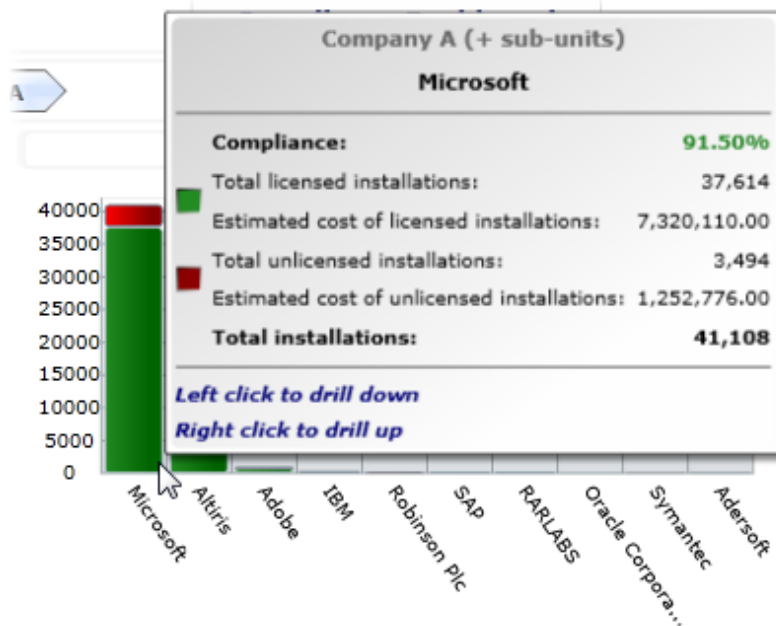
Each column displays the total number of product installations for its item. The columns are ordered by the total number of product installations. The columns are split into two stacks. The green stack shows the total number of licensed installations. The red stack shows the total number of non-licensed installations.



Total installations can be represented as a number count or an estimated cost. Click ▼ in the drop-down box above the chart to change the display.



Hover the mouse over any column for further details of the item's compliance status.



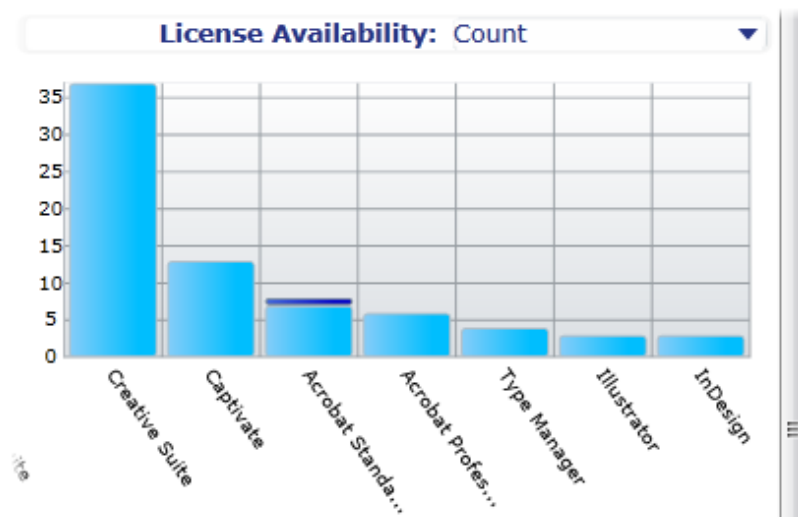
The above text box displays Microsoft compliance data for company A, including its child business units.

License Availability Chart

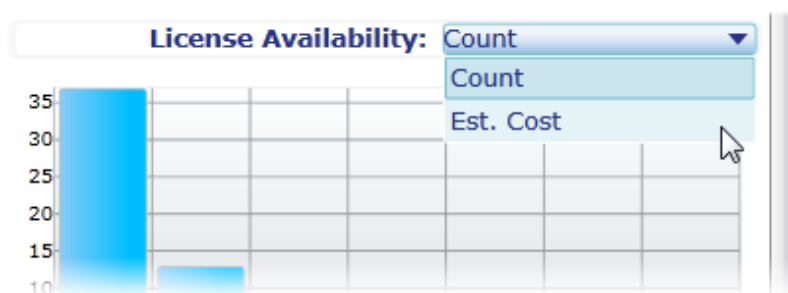
The license availability chart displays the unallocated license types for the selected business unit.

You can drill into the data to show installations by manufacturer, product or product version. You can also launch a [License Entitlement - Available Entitlement report](#) for each column in the table.

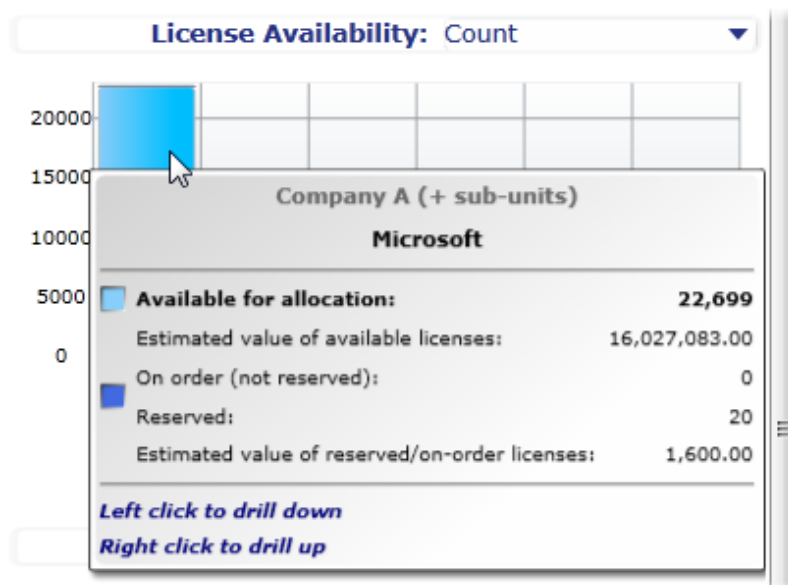
Each column shows the total number of unallocated licenses for its item. The columns are ordered by the total number of unallocated licenses. The columns are split into two stacks. In the example below, the light blue stack shows the total number of licenses available for allocation. The darker blue stack shows the total number of licenses that are either reserved or on-order (i.e. unavailable).



License availability can be represented as a number count or an estimated cost. Click ▼ in the drop-down box above the chart to change the display.



Hover the mouse over any column for further availability details of the item.

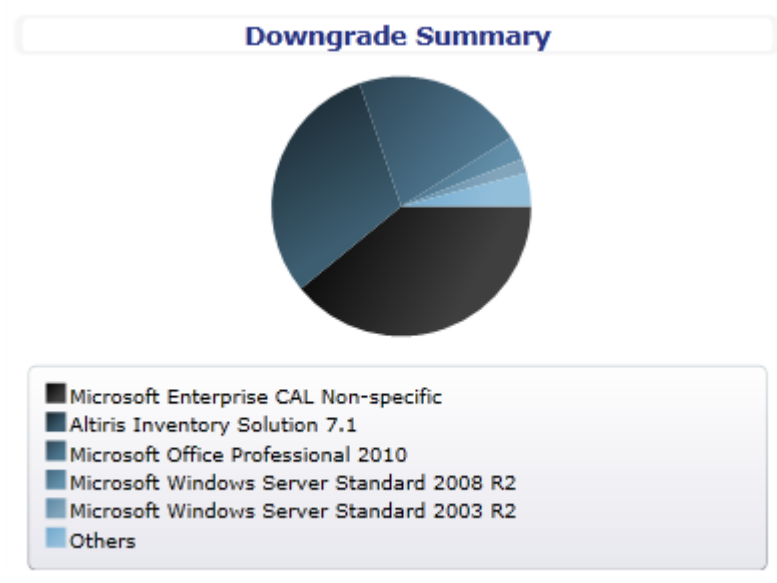


The above pop-up box displays the available Microsoft licenses for company A, including its child business units.

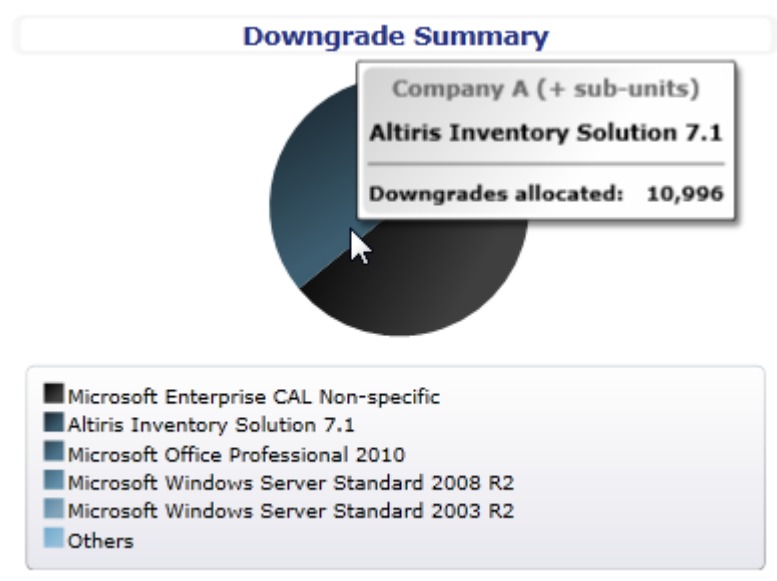
Downgrade Summary Chart

The downgrade summary chart shows the products that have downgrade licenses allocated for the selected business unit.

The top five products are shown according to number of downgrades allocated. A sixth segment shows a combined total for all other products that have downgrade licenses allocated to them.



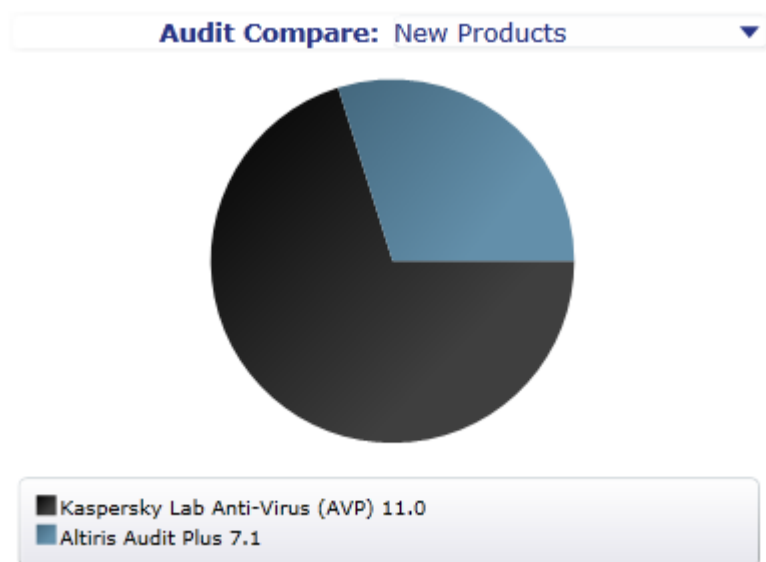
Hover the mouse over any segment for further details about the item.



The above pop-up box displays the downgrade licenses allocated to the Altiris Inventory Solution 7.1 product for the whole of company A, including its child business units.

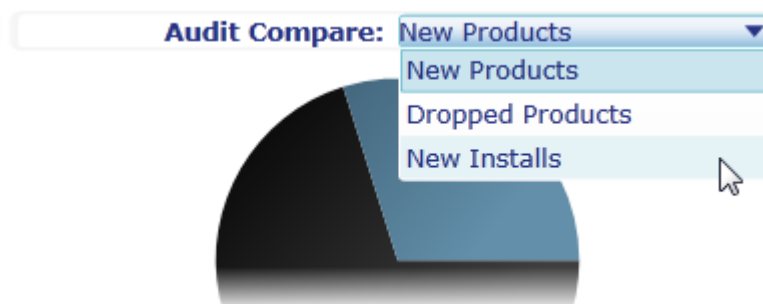
Audit Compare Chart

The audit compare chart shows the difference between the last two fully completed audits for the selected business unit. The five main differences are displayed as segments in the chart. A sixth segment shows the combined total of all other results.



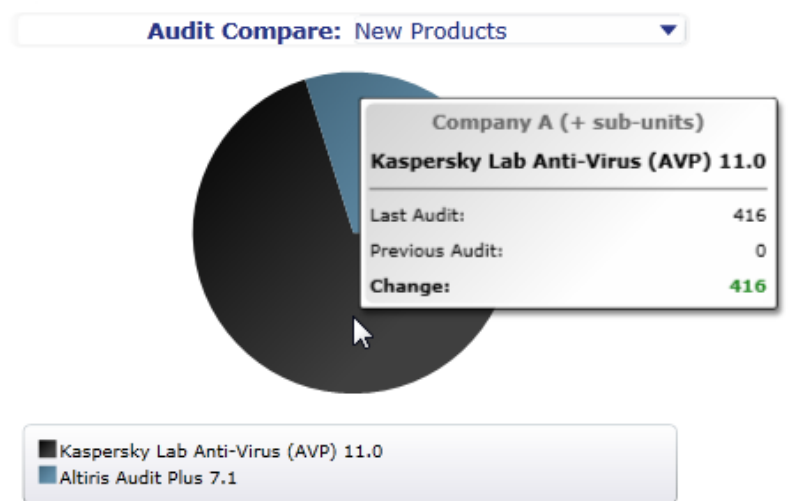
There are three variations of this chart.

- Click ▼ to change the chart display.



- **New Products** shows products that were found in the last audit, but not the previous audit. The top five products are shown according to the number of installations. A sixth segment shows a combined total for all other products.
- **Dropped Products** shows products that were not found in the last audit but existed in the audit before that. The top five products are shown according to the number of installations. A sixth segment shows a combined total for all other products.
- **New Installs** shows installations of products that existed in the previous audit but have been increased in the last audit.

Hover the mouse over any segment for more details about that segment.



The above pop-up box displays the number of installs of the Kaspersky Lab Anti-Virus (AVP) 11.0 product over the last two audits for the whole of company A, including its child business units.

Device Summary by OS Chart

The device summary by OS chart shows the number of installed operating systems on devices in the selected business unit.

The top five operating systems are shown according to the number of devices they are installed on. A sixth segment shows a combined total for all other operating systems. You can launch a [Cleansing - Device Details report](#) for each slice in the chart.



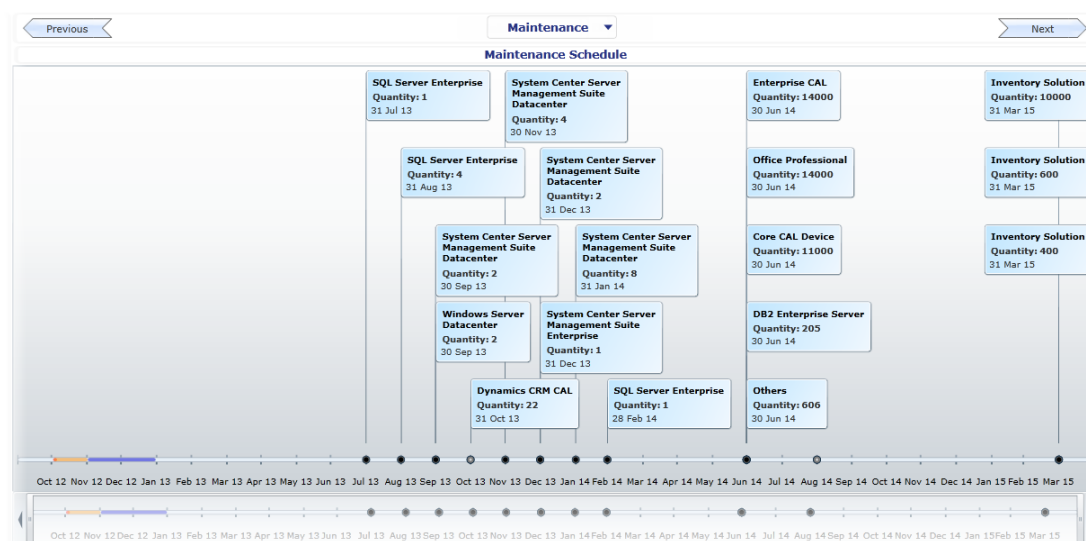
Hover the mouse over any segment for further details of the installed operating systems.



The above pop-up box displays the number of Microsoft Windows XP Professional operating systems installed on devices in the whole of company A, including its child business units.

Maintenance Chart

The maintenance chart shows the timeline for upcoming maintenance license renewals. The timeline begins 30 days before the current date and ends at the last maintenance license expiration date for the selected business unit.



Each point on the timeline represents the expiration date of an individual maintenance license. Details of each item are shown on flags attached to the points. They are color coded according to how soon the license expires.

- Red: Maintenance expires today or has already expired
- Orange: Expires within the next 30 days
- Purple: Expires 30 to 90 days from the current date

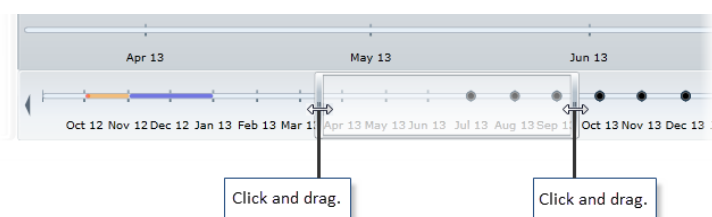
How to Navigate the Maintenance Chart

You can zoom into the maintenance schedule and launch reports.

Zooming into the maintenance schedule

The title bar shows the time period displayed in the workspace.

Click and drag the left or right zoom controls to alter the size of the time period displayed.

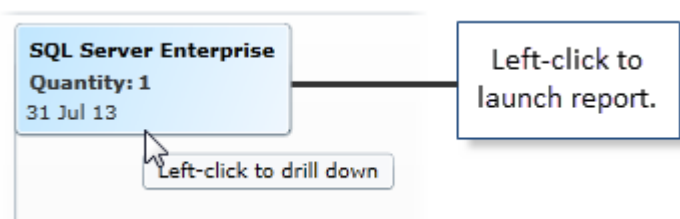


Click the left and right scroll arrows to change the position of the time period that is displayed, or click and drag the title bar to the left or right.



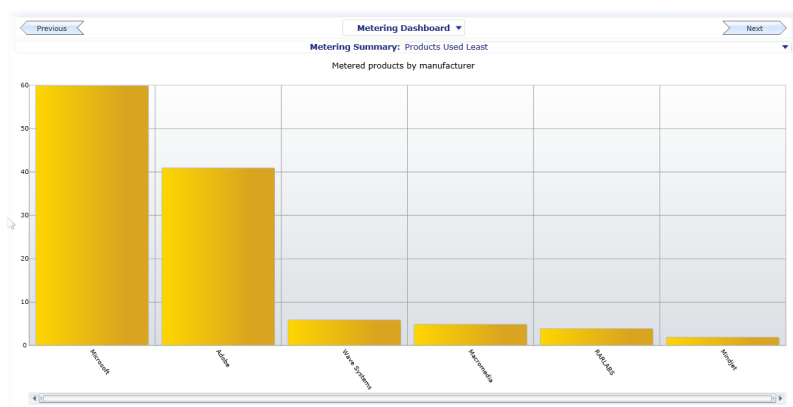
Launching Reports

Left-click an item in the schedule to launch a [License Entitlement - Maintenance Schedule report](#) for the item.



Metering Charts

The metering charts shows software usage analysis for products in your organization. Results can be displayed for the entire organization, or they can be filtered by business unit.



There are three metering charts.

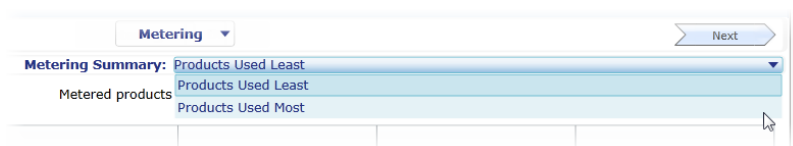
- The [Metered Products by Manufacturer](#) chart
- The [Days Elapsed Since Last Usage Chart](#) chart
- The [Breakdown Of Last Usage Across All Installations Chart](#) chart

How to Navigate the Metering Charts

You can view the most or least used metered products, zoom in, drill down into the data and launch reports.

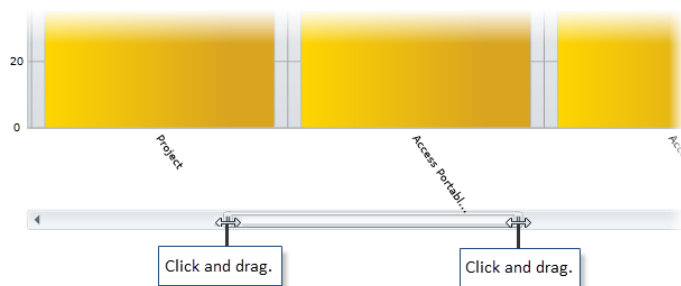
Metering summary

The metering summary chart displays the most or least used products for the selected business unit. Click ▼ in the drop-down list to change the chart display to represent the product used least or most.

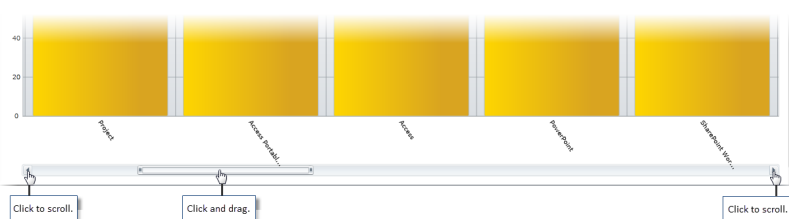


Zooming into the metering charts

The horizontal scroll bar can be adjusted to display more or less columns in the chart. Click and drag the left or right zoom controls to alter the number of displayed columns.

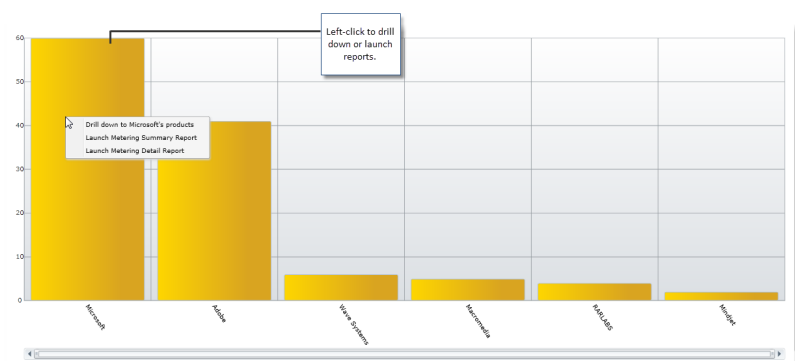


Click the left and right scroll arrows to change the position of the time period that is displayed, or click and drag the title bar to the left or right.



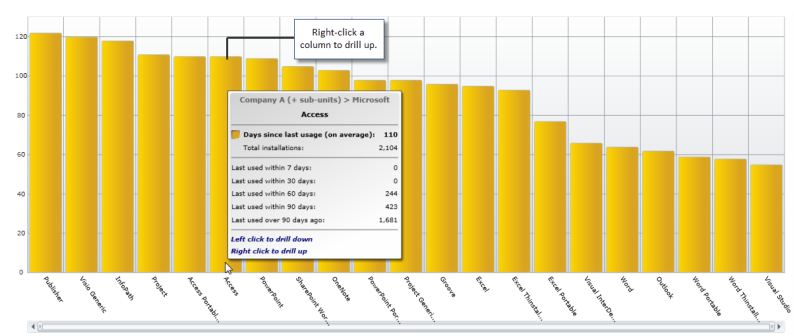
Drilling and launching reports

Left-click on any column in a chart to drill down into the data or launch reports.



- Click **Drill down to Microsoft's products** to show a chart containing metered Microsoft product data.
- Click **Launch Metering Summary Report** to show a [Software Metering - Product Metering Summary report](#) for the manufacturer.
- Click **Launch Metering Detail Report** to show a [Software Metering - Product Metering Details report](#) for the manufacturer.

Right-click any column to drill up.



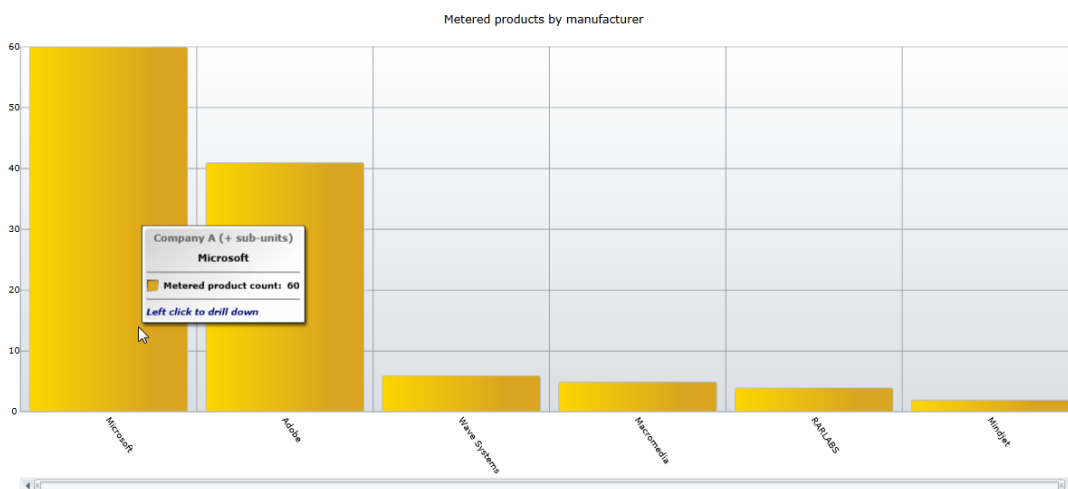
You can drill into the data to show:

- The number of [products by manufacturer](#)
- The average number of days elapsed since the [last usage of a product, by product family](#)
- The average number of days elapsed since the [last usage of a product, by product version](#)
- The breakdown of the [last usage of a product version across all installations](#)

Hover the mouse over any column in a chart to display additional information for that item. Each chart you drill down to holds different information.

Metered Products by Manufacturer

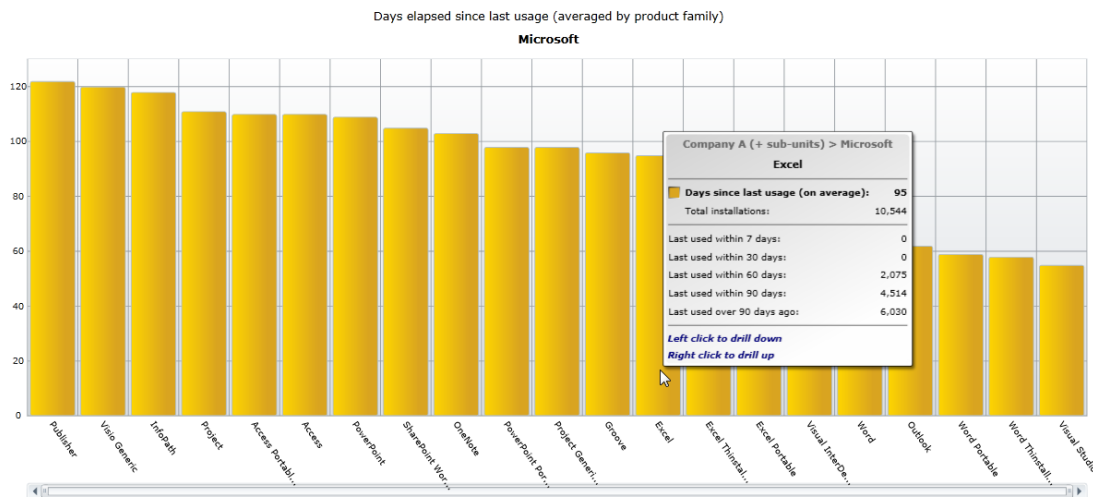
The metered products by manufacturer chart displays the number of products used in the organization according to their manufacturer.



The above pop-up box displays the metered Microsoft products for the whole of company A, including its child business units.

Days Elapsed Since Last Usage Chart

The days elapsed since last usage chart displays the average length of time since a product or product family was last used on the devices in the organization.

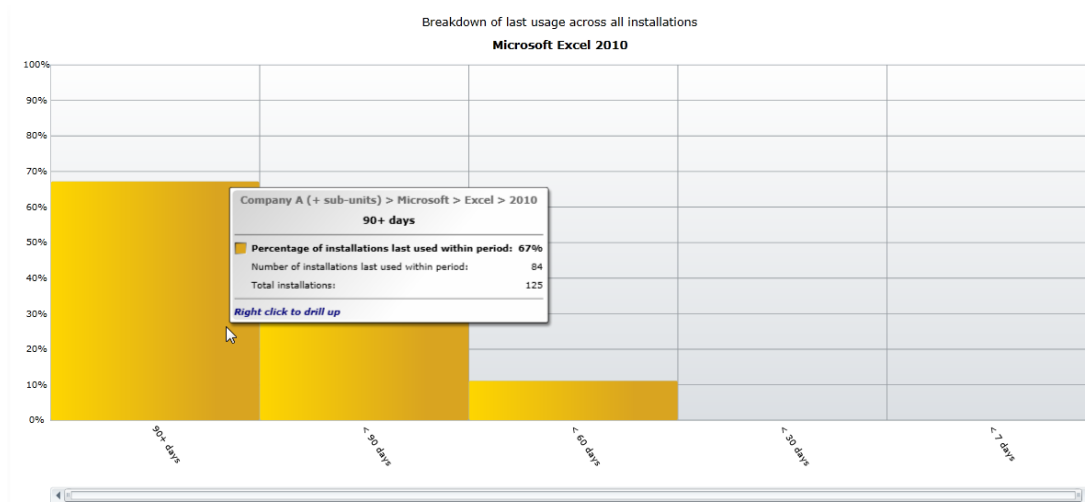


The above pop-up box displays the average number of days since the last usage of Microsoft Excel for the whole of company A, including its child business units.

Breakdown Of Last Usage Across All Installations Chart

The breakdown of last usage across all installations chart displays a breakdown of the length of time since a product was last used. The average length of time is split into 5 periods.

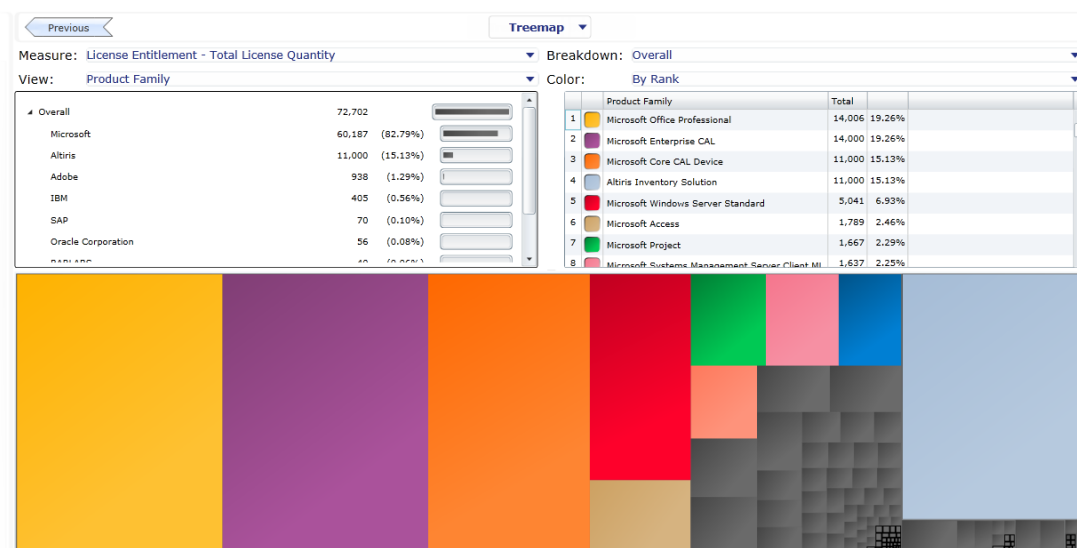
- The percentage of product installations used in the last 7 days
- The percentage of product installations used in the last 30 days
- The percentage of product installations used in the last 60 days
- The percentage of product installations used in the last 90 days
- The percentage of product installations that have not been used in the last 90 days



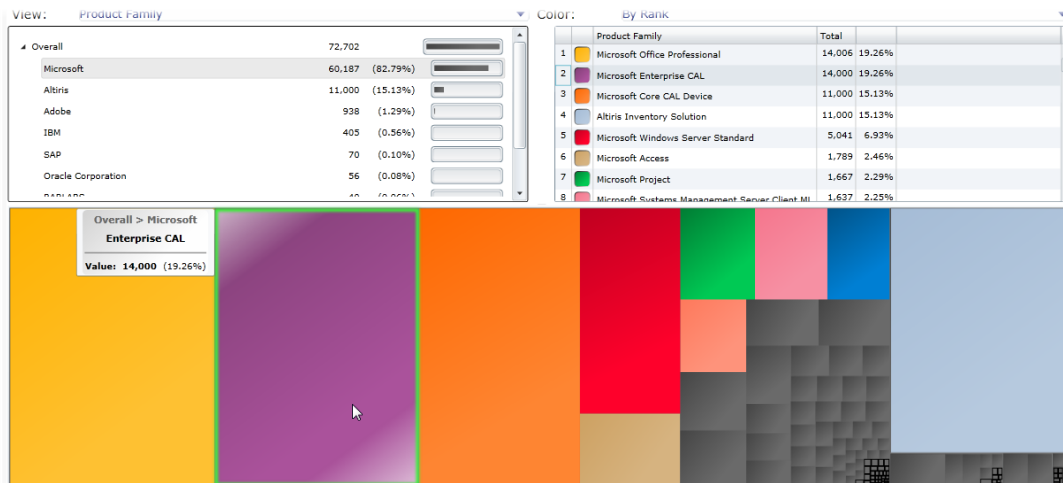
The above pop-up box displays the percentage of Microsoft Excel 2010 installations last used over 90 days ago for the whole of company A, including its child business units.

Treemap Chart

The treemap chart displays data for the entire organization in an interactive treemap chart.



Click on any item in the chart or tables to highlight it in both tables and the chart.



How to Navigate the Treemap Dashboard

You can view the quantities and cost estimates for different measures of data in the database. The data can be grouped, broken down and color coded.

Measure

Click ▼ in the drop-down list to change the measure.



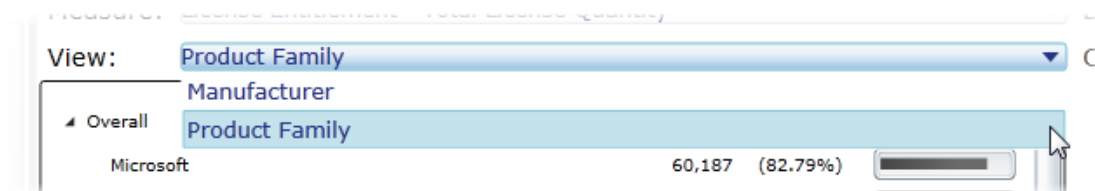
Measure Options

- License Entitlement - Total License Quantity
- License Entitlement - Estimated Cost
- License Availability - Total License Quantity
- License Availability - Estimated Value
- Software Usage - Total Installations
- Software Usage - Estimated Cost
- Compliance - Shortfall

- Compliance - Estimated Cost of Shortfall
- True-up - Total License Quantity
- True-up - Estimated Cost

View

Click ▼ in the drop-down list to change the view.

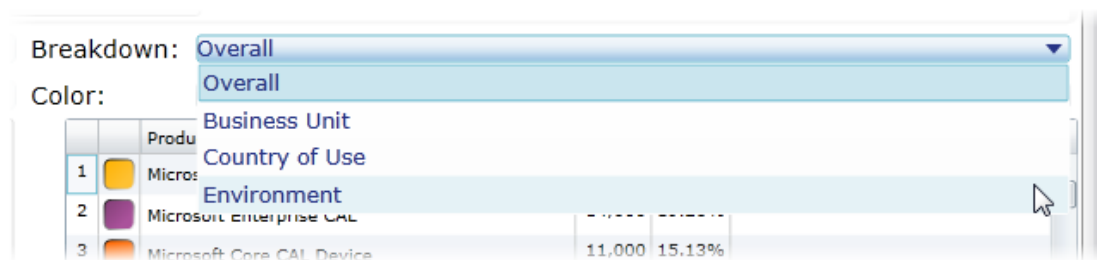


Views

- Manufacturer
- Product Family

Breakdown

Click ▼ in the drop-down lists to change the breakdown.

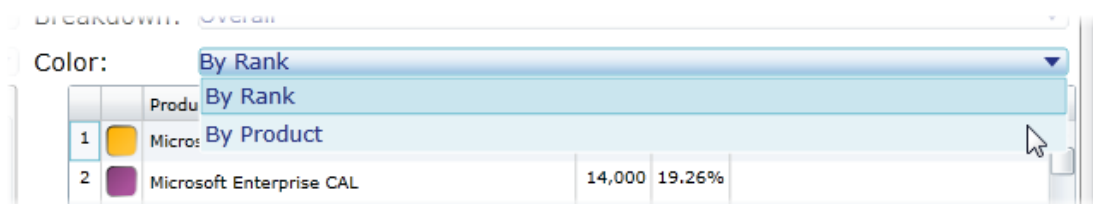


Breakdown Options

- Business Unit
- Environment
- Country of Use
- Overall

Color

Click ▼ in the drop-down lists to change the color coding.

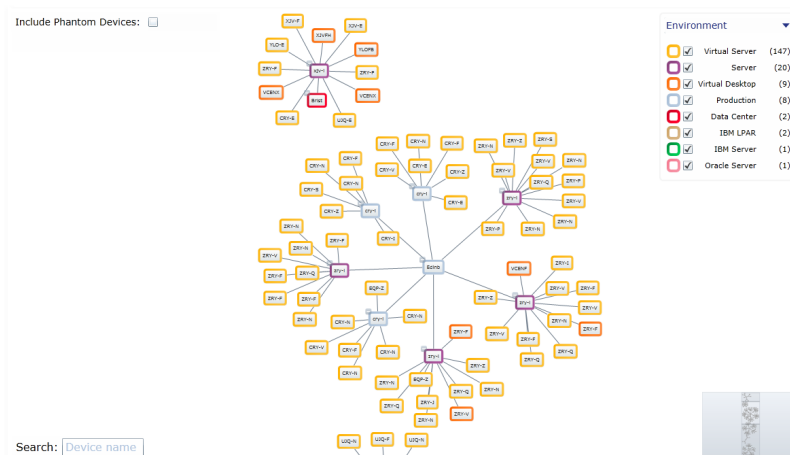


Color Coding Options

- By Rank
- By Product

Virtualization Chart

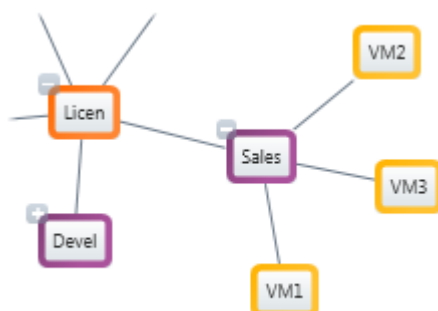
The virtualization chart shows the structure of the virtualization environment for the organization.



How to Navigate the Virtualization Dashboard

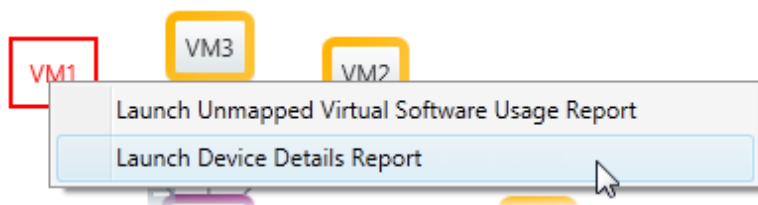
The Virtualization Environment is structured by;

- Data Centers.
- Physical servers in the Data Center.
- Virtual servers and devices hosted on each physical server.



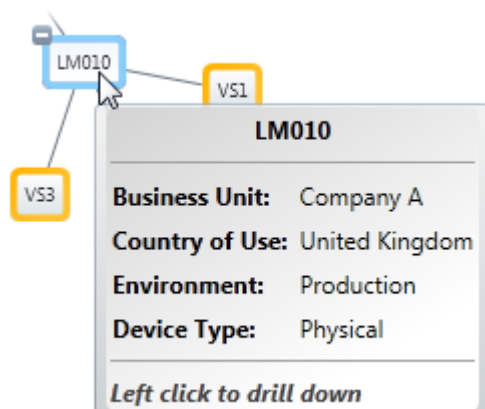
- Click + to show devices mapped to the host.
- Click - to hide devices mapped to the host.

Left-click a Device to select it and launch reports.



- A Virtual Device allows you to launch [Virtualization - Unmapped Guest Software Usage reports](#) and [Cleansing - Device Details by Audit Run reports](#).
- A Server allows you to launch [Cleansing - Device Details by Audit Run reports](#).
- A Data Center allows you to launch [Cleansing - Device Details by Audit Run reports](#).

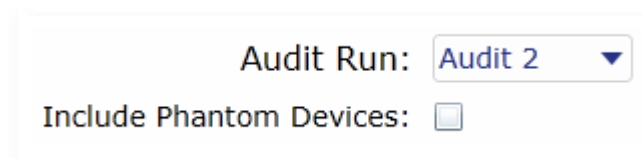
Hover the mouse over a device for more details.



Audit Runs

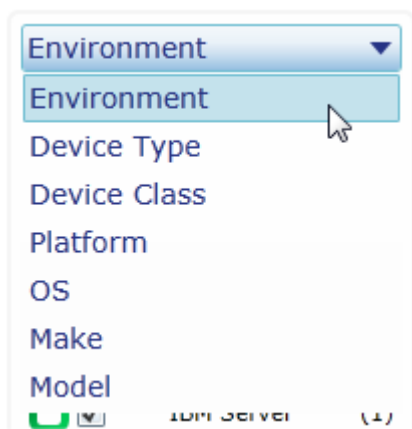
The Virtualization Environment can be displayed for different audit runs.

- Click ▼ in the drop-down list to change the Audit Run.
- Tick **Include Phantom Devices** to show any phantom devices in the audit run.



Highlighting

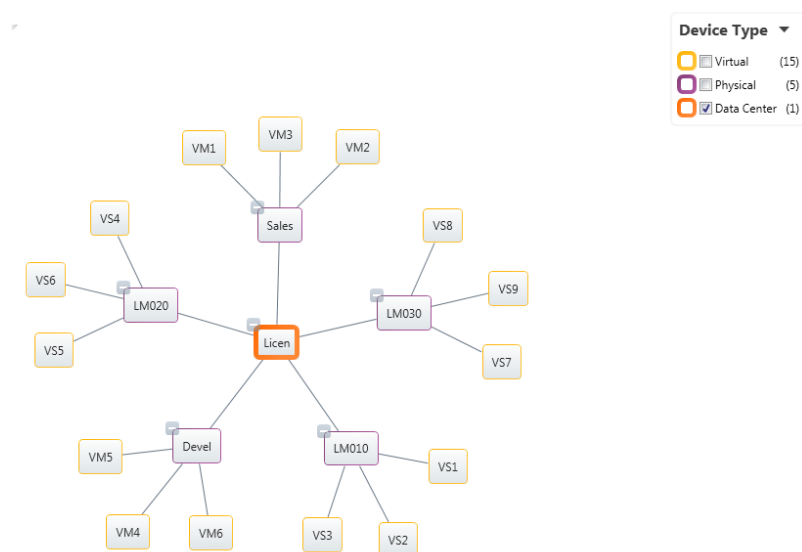
Click ▼ in the drop-down list to change the Highlighting.



The display can be changed to highlight the devices by;

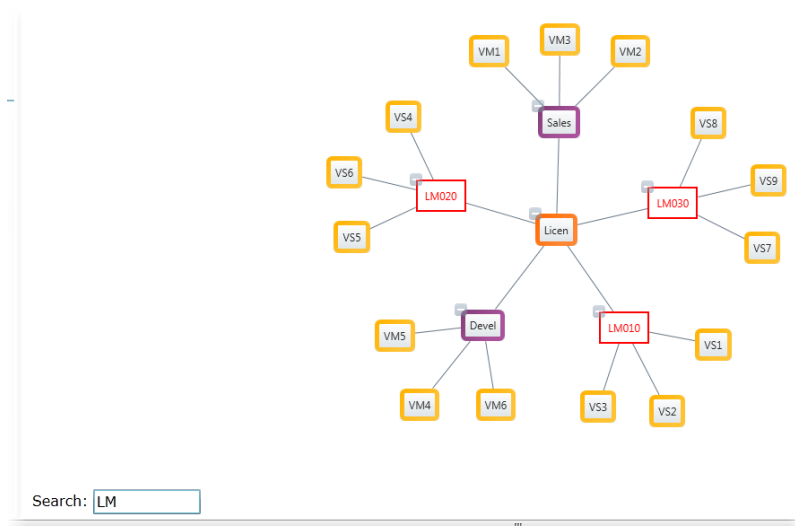
- Environment
- Device Type
- Device Class
- Platform
- Operating System
- Make
- Model

Tick a highlight to highlight the Device in the Dashboard.



Searching

Type the Device Name in the search field and press enter. The results are highlighted in the Dashboard.

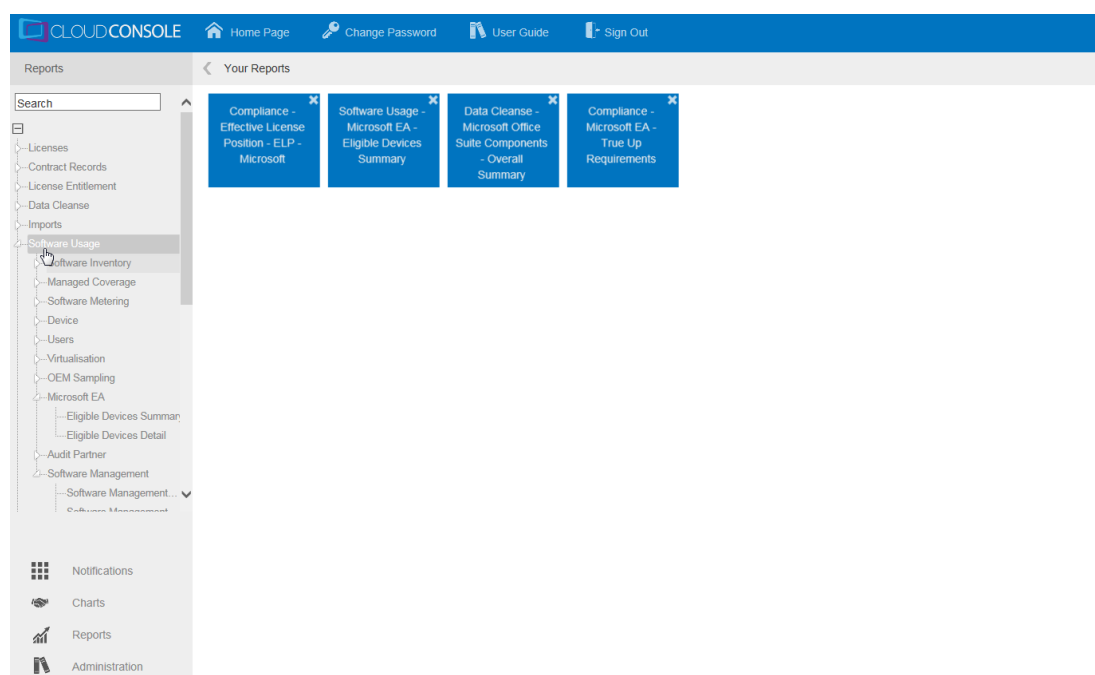


REPORTS

Cloud Console comes with a number of pre-defined reports. These are available in the reports workspace.

The reports are based on the entire organization's data held in License Manager. The parameters for each report are fixed, but the results can be filtered and re-ordered. Reports can also be grouped to display data by business unit or by parent business unit with all child business units.

Click **Reports** in the navigation menu to access the reports workspace.

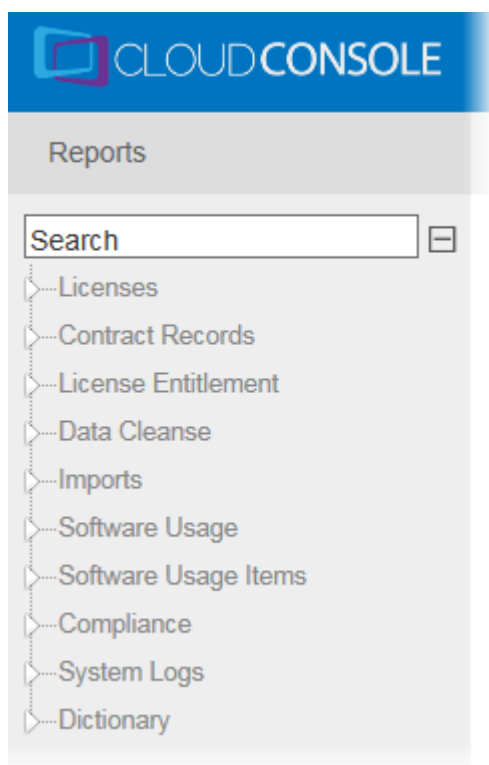


Reports can contain a dataset that is too large to fit within the browser window. Vertical and horizontal scrolls bar allow you to move the data to the left or right to reveal additional data and columns.

How to Navigate Reports

How to view a report

The reports are available in the navigation menu.



The reports are split into 10 categories. Some of the main categories are also split into sub categories.

- Click a category name to expand or collapse the menu
- Click on a report to view it in the main window of the web page:


Reports Toolbar

The reports toolbar has additional functions for the reports workspace.




Export to excel

The export button allows you to export a report as an MS Excel file. *Please note, this will include any filters that have been applied.*

1. Click . The report is exported and saved in your downloads folder.



Export to .csv

The export button allows you to export a report as a .csv file. *Please note, this will include any filters that have been applied.*

1. Click . The report is exported and saved in your downloads folder.

Pin a report

The pin button allows you to pin or unpin a report to home page for the reports workspace. *Please note, this will include any filters that have been applied.*

1. Click . The report is pinned to the home page for the reports workspace
 - Click  to unpin the report

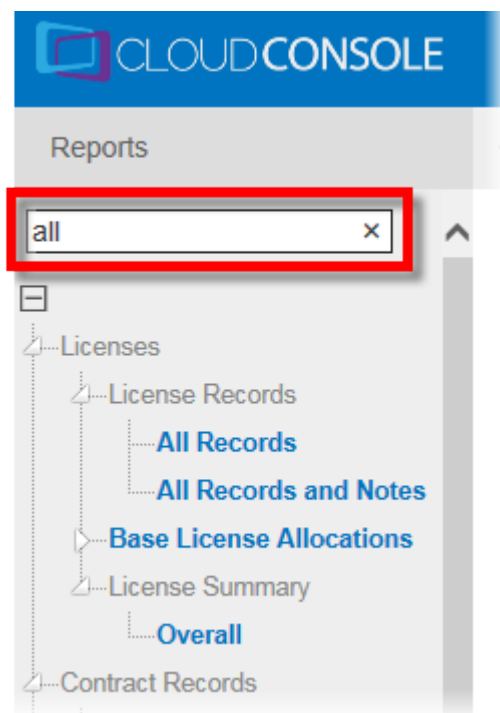
Pinned reports are displayed in the home page for the reports workspace. Click **Reports** in the navigation menu to view this page:



- Click a pinned report to view it
- Click **X** on a report to unpin it

Searching

1. Type a report name in the search field in the navigation menu. The reports are filtered and displayed below:



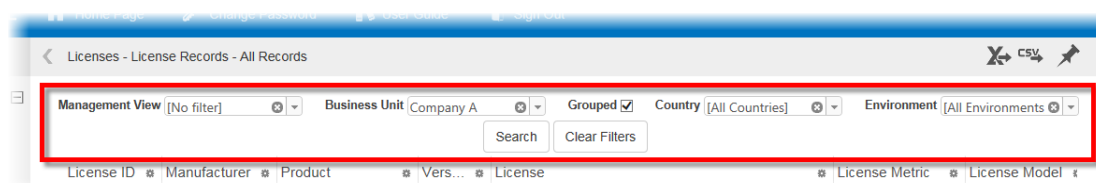
- Click a report to view it
- Click X to clear the search

How to Refine and Sort Report Data

Use a combination of search, filters and sorting to find and display specific information in any report. The results can then be exported or pinned to the reports workspace home page.

How to apply a filter to your report

The results of any report can be filtered by using the fields at the top of the screen:



1. Select the filters you want to apply:

- Management view. Select a **Management View** to apply to the report. This will filter the data according to the filters defined in the management view. *Please Note: Management views are defined by an administrator. The management views are associated with the [Service Roles](#) associated with your [Users](#) account*
 - Business unit. Select a **Business Unit** to only show data related to that business unit
 - Tick **Grouped** to include data from all child business units
 - Country. Select a **Country** to only show data related to that country
 - Environment. Select an **Environment** to only show data related to that environment
2. Click **Search**. The filters are applied to the data and the results are displayed in the report
- Click **Clear Filters** to remove the filters from the data and refresh the report

Note: Some reports include additional filters.

Column Filters

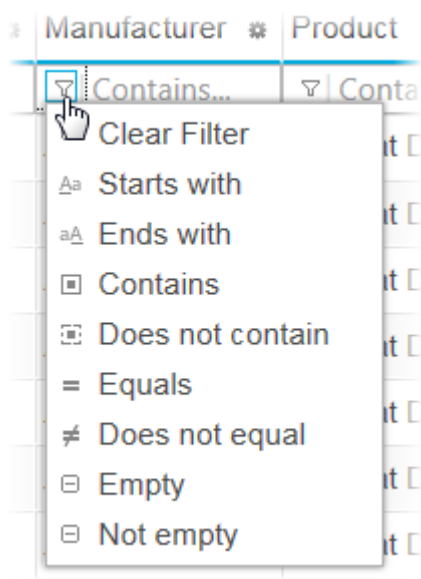
Column filters are used to filter the results by items under a column in the report. *For example; the manufacturer column displays a list of all the product manufacturers identified in the report. You may want the report to just show Microsoft or Adobe products.*

Column filters are available below the header of each column:

The screenshot shows the 'Licenses - License Records - All Records' page. At the top, there are filter controls for Management View, Business Unit (Company A), Grouped (checked), Country (All Countries), and Environment (All Environments). Below these are 'Search' and 'Clear Filters' buttons. The main table has columns: License ID, Manufacturer, Product, Vers, License, License Metric, and License Model. Each column header has a dropdown filter icon. A red box highlights the filter dropdowns for the first six columns. The table contains 2819 records, with the first 10 visible. The bottom of the page shows a pagination bar: '1 - 25 of 2819 records', 'Pg 1 of 113', and 'Show 25 records'.

License ID	Manufacturer	Product	Vers	License	License Metric	License Model
1897	Adobe	Acrobat Distiller	5.0	Acrobat Distiller 5.0 MLP AOO License IE NT/UNIX	Device	License Only
1949	Adobe	Acrobat Distiller	5.0	Acrobat Distiller 5.0 MLP AOO License IE NT/UNIX	Device	License Only
1950	Adobe	Acrobat Distiller	5.0	Acrobat Distiller 5.0 MLP AOO License IE NT/UNIX	Device	License Only
1972	Adobe	Acrobat Distiller	6.0	Acrobat Distiller 6.0 WIN AOO License IE 100PK...	Device	License Only
1901	Adobe	Acrobat Distiller	6.0	Acrobat Distiller 6.0 WIN AOO License IE 100PK...	Device	License Only
1903	Adobe	Acrobat Distiller	6.0	Acrobat Distiller 6.0 WIN AOO License IE 100PK...	Device	License Only
1926	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1928	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1933	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1874	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1419	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1612	Adobe	Acrobat Professio...	6.0	Acrobat Pro 6.0	Device	License Only
1613	Adobe	Acrobat Professio...	7.0	Acrobat Pro 7.0	Device	License Only
1782	Adobe	Acrobat Professio...	7.0	Acrobat Professional 7.0 WIN AOO License IE	Device	License Only
1806	Adobe	Acrobat Professio...	7.0	Acrobat Professional 7.0 WIN AOO License IE	Device	License Only

1. Click the filter icon in the column you want to filter. The filter operators are displayed:



2. Select a filter operator. *Please note: the options vary according to the type of data in the column*
3. Type the criteria for the filter
4. The results are displayed in the report:

Licenses - License Records - All Records

Management View [No filter] Business Unit Company A Grouped ☒ Country [All Countries] Environment [All Environments]

Search Clear Filters

License ID	Manufacturer	Product	Vers...	License	License Metric	License Model	License Qty
▽ Equals...	▽ Micro	▽ Contains...	▽ Contain	▽ Contains...	▽ Contains...	▽ Contains...	▽ Equals...
1083	Microsoft	Access	2000	Access 2000 Win32 English MVL	Device	License Only	5
1134	Microsoft	Access	2000	Access 2000 Win32 English VUP MVL	Device	Upgrade License	1
2251	Microsoft	Access	2000	Access 2000 Win32 English VUP OLP	Device	Upgrade License	10
2287	Microsoft	Access	2000	Access 2000 Win32 English VUP OL...	Device	Upgrade License	3
2568	Microsoft	Access	2002	Access 2002 Win32 English MVL	Device	License Only	1
987	Microsoft	Access	2002	Access 2002 Win32 English MVL	Device	License Only	1
756	Microsoft	Access	2002	Access 2002 Win32 English MVL	Device	License Only	1
758	Microsoft	Access	2002	Access 2002 Win32 English MVL	Device	License Only	1
808	Microsoft	Access	2002	Access 2002 Win32 English MVL	Device	License Only	1
293	Microsoft	Access	2002	Access 2002 Win32 English MVL	Device	License Only	1
455	Microsoft	Access	2002	Access 2002 Win32 English MVL	Device	License Only	1
473	Microsoft	Access	2002	Access 2002 Win32 English MVL	Device	License Only	2
307	Microsoft	Access	2003	Access 2003 Win32 English MVL	Device	License Only	1
1248	Microsoft	Access	2003	Access 2003 Win32 English MVL	Device	License Only	1
2541	Microsoft	Access	2003	Access 2003 Win32 English MVL	Device	License Only	1

1 - 25 of 1981 records Pg 1 of 80 Show 25 records

Note: Multiple columns can be filtered to further refine the data.

Drill-down

Some reports allow you to drill down into further detail. These reports show a drill down button in the first column:

Manufacturer	Product	Vers...	Categ...	License Metric	Usage...	License C
▽ Contains...	▽ Contains...	▽ Contain	▽ Contains	▽ Contains...	▽ Equals...	▽ Equal
AbleBits	Fuzzy Duplicate Finder in Excel	4.0			2	0
Acoolsoft	PPT to Video Pro	3.2			1	0
Acorah Software	TaxCalc	2.x			2	0
Acesso Software	InstallShield for Microsoft Visual C++	6.0			2	0
Active Database Softw...	FlySpeed SQL Query	2.1			2	0
Active Database Softw...	FlySpeed SQL Query	2.10			2	0
Active Database Softw...	FlySpeed SQL Query	2.9			1	0
Adblock Pro Team	Adblock Pro	3.0			2	0
Adblock Pro Team	Adblocker	1.2			2	0
Adblock Pro Team	Adblocker	2.0			2	0
Adept SQL Tools	AdeptSQL Diff	1.9			5	0
Adersoft	VbsEdit	6.5			1	0
Adersoft	VbsEdit	6.6			1	0
Admiralty RYA	Admiralty RYA Electronic Chart Plotter - Training Vers...	2.0			1	0

1 - 25 of 1398 records Pg 1 of 56 Show 25 records

1. Click  to drill down.

Sorting

Left-click on any column heading in the workspace pane to sort the data alphabetically or numerically. The first click sorts the data in ascending order, and a second click sorts the data in descending order.

Pagination

Reports containing a large amount of rows are split into multiple pages

← Licenses - License Records - All Records X CSV ↗

Management View [No filter] Business Unit Company A Grouped ☒ Country [All Countries] Environment [All Environments]

Search Clear Filters

License ID	Manufacturer	Product	Vers...	License	License Metric	License Model
▽ Equals...	▽ Contains...	▽ Contains...	▽ Contain	▽ Contains...	▽ Contains...	▽ Contains...
1897	Adobe	Acrobat Distiller	5.0	Acrobat Distiller 5.0 MLP AOO License IE NT/UNIX	Device	License Only
1949	Adobe	Acrobat Distiller	5.0	Acrobat Distiller 5.0 MLP AOO License IE NT/UNIX	Device	License Only
1950	Adobe	Acrobat Distiller	5.0	Acrobat Distiller 5.0 MLP AOO License IE NT/UNIX	Device	License Only
1972	Adobe	Acrobat Distiller	6.0	Acrobat Distiller 6.0 WIN AOO License IE 100PK...	Device	License Only
1901	Adobe	Acrobat Distiller	6.0	Acrobat Distiller 6.0 WIN AOO License IE 100PK...	Device	License Only
1903	Adobe	Acrobat Distiller	6.0	Acrobat Distiller 6.0 WIN AOO License IE 100PK...	Device	License Only
1926	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1928	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1933	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1874	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1419	Adobe	Acrobat Distiller	8.0	Adobe Distiller Svr 8.0 WIN AOO License IE 100 PK	Device	License Only
1612	Adobe	Acrobat Professio...	6.0	Acrobat Pro 6.0	Device	License Only
1613	Adobe	Acrobat Professio...	7.0	Acrobat Pro 7.0	Device	License Only
1782	Adobe	Acrobat Professio...	7.0	Acrobat Professional 7.0 WIN AOO License IE	Device	License Only
1806	Adobe	Acrobat Professio...	7.0	Acrobat Professional 7.0 WIN AOO License IE	Device	License Only

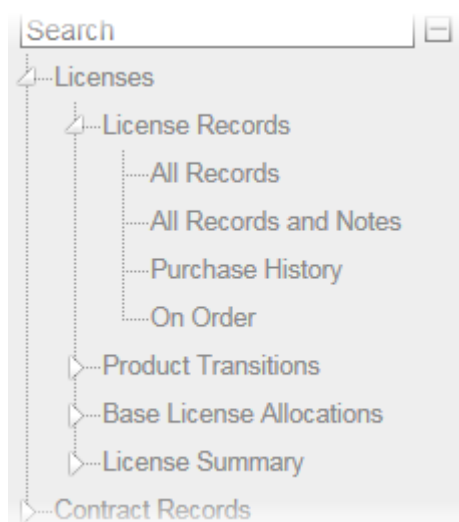
1 - 25 of 2819 records ← prev Pg 1 of 113 next → Show 25 records

Use the options to adjust the view:

- The default setting displays 50 lines on one page. Adjust the **Show *n* records** settings to view more or less results per page
- Select a page number or use the prev and next buttons to move between pages in your report

License Records

License records reports allow you to display, collate and sort data collected in the license records workspace of License Manager. Access the reports using the links in the navigation menu:



License Records - All Records

The License Records - All Records report shows all licenses in the License Records workspace.

Columns

- License ID
- Manufacturer
- Product
- Version
- License
- License Metric
- License Model
- License Quantity
- Maint Qty
- Maint Expiry
- Agreement Type
- Status
- Load Status
- Country of Agreement
- Country of Use
- Business Unit
- Environment

License Records - All Records and Notes

The License Records - All Records report shows all licenses in the License Records workspace and includes any notes.

Columns

- License ID

- Manufacturer
- Product
- Version
- License
- License Metric
- License Model
- License Quantity
- Maint Qty
- Maint Expiry
- Agreement Type
- Status
- Load Status
- Country of Agreement
- Country of Use
- Business Unit
- Environment
- Notes

License Records - Purchase History

The License Records - Purchase History report shows the organization's license purchase history. Licenses must have a Purchase Date to be included.

Columns

- License ID
- Manufacturer
- Product
- Version
- License
- License Metric
- License Qty
- Maint Qty
- Agreement Type
- Agreement Number
- Supplier
- Invoice Number
- PO Number
- Cost
- Total Cost
- Currency
- Purchase Date
- Ordered By
- Environment
- Country of Use
- Country of Agreement

- Status
- Notes

License Records - On Order

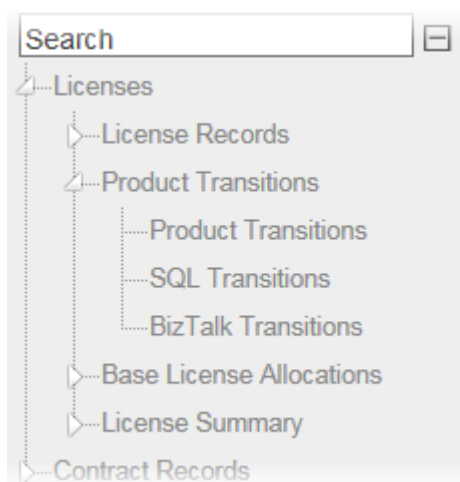
The License Records - On Order report shows licenses on order in the whole organization.

Columns

- Manufacturer
- License
- License Metric
- License Qty
- Maint Qty
- License Model
- Supplier
- Cost per License
- Agreement Name
- Agreement Number
- Enrolment Number
- Owner
- Business Unit
- Country of Agreement
- Country of Use
- Environment
- Notes

Product Transitions

The product transitions reports show details of products which have been upgraded due to a change in how they are licensed. Access the reports using the links in the navigation menu:



Product Transitions - Product Transitions

The Product Transitions - Product Transitions report shows all transitioned products.

Columns

- License ID
- Business Unit
- Environment
- Country Name
- Manufacturer
- Product
- Version
- License Metric Name
- Quantity Maintenance
- Quantity Products Covered
- Original Manufacturer
- Original Product
- Original Version
- Original Metric Name
- Original Quantity Maintenance
- Original Quantity Products Covered

Product Transitions - SQL Transitions

Product Transitions- SQL Transitions report documents all installations of SQL and the transitionable value should they be licensed with appropriate SQL license with active SA at the transition date.

Columns

- Computer Name
- Machine Type
- Machine Serial Number
- Number of Processors
- Cores Per Processor
- Total Physical Cores
- CPU
- SQL Server Edition Installed
- Core Factor
- Core Licenses Needed - Enterprise
- Core Licenses Needed - Standard

Product Transitions - BizTalk Transitions

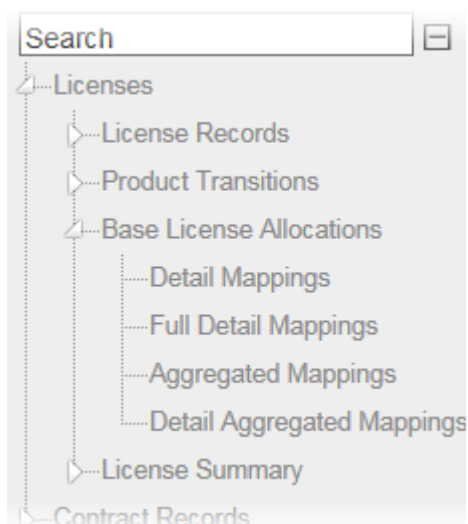
Product Transitions - BizTalk Transitions report documents all installations of BizTalk and the transitionable value should they be licensed with appropriate BizTalk license with active SA at the transition date

Columns

- Computer Name
- Machine Type
- Machine Serial Number
- Number of Processors
- Cores Per Processor
- Total Physical Cores
- CPU
- BizTalk Server Edition Installed
- Core Factor
- Core Licenses Needed - Enterprise
- Core Licenses Needed - Standard

Base License Allocations

Base license allocations reports allow you to display, collate and sort base license allocation data from the license records workspace in License Manager. Access the reports using the links in the navigation menu:



Base License Allocations - Detail Mappings

The Base License Allocations - Detail Mappings report shows the allocation of base licenses against upgrade licenses in the License Records workspace.

Columns

- Business Unit
- Country of Use
- Environment
- Base License ID
- Base Manufacturer
- Base Product
- Base Version
- Base License
- Base License Model
- Quantity Allocated
- Upgrade License ID
- Upgrade Manufacturer
- Upgrade Product
- Upgrade Version
- Upgrade License
- Upgrade License Model

Base License Allocations - Full Detail Mappings

The Base License Allocations - Full Detail Mappings report that shows Base Licenses against upgrade licenses in the License Records workspace where all Base Licenses have been allocated.

Columns

- Business Unit
- Country of Use
- Environment
- Base License ID
- Base Parent
- Base Department
- Base Manufacturer
- Base Product
- Base Version
- Base License
- Base Metric
- Base License Model
- Base Maintenance Expiry
- Quantity Allocated
- Upgrade License ID
- Upgrade Parent
- Upgrade Department
- Upgrade Manufacturer
- Upgrade Product
- Upgrade Version
- Upgrade License
- Upgrade Metric

- Upgrade License Model
- Update Agreement Start

Base License Allocations - Aggregated Mappings

The Base License Allocations - Aggregated Mappings report shows a simplified summary of your Base License allocation.

Columns

- Business Unit
- Base Manufacturer
- Base Product
- Base Version
- Base Metric
- Base License Model
- Number of Inventory Items
- Total Allocated
- Upgrade Manufacturer
- Upgrade Product
- Upgrade Version
- Upgrade Metric
- Upgrade License Model

Base License Allocations - Detail Aggregated Mappings

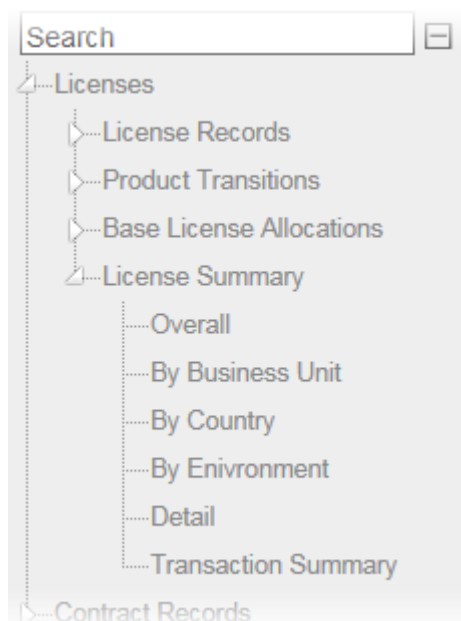
The Base License Allocations - Detail Aggregated Mappings report shows the total number of allocated Base Licenses across your organization.

Columns

- Business Unit
- Base Manufacturer
- Base Product
- Base Version
- Base License
- Base Metric
- Base License Model
- Num Inventory Items
- Total Allocated
- Upgrade Manufacturer
- Upgrade Product
- Upgrade Version
- Upgrade License
- Upgrade Metric
- Upgrade License Model

License Summary

The license summary reports show license data in a format equivalent to the Microsoft License Statement (MLS) spreadsheet. Access the reports using the links in the navigation menu:



License Summary - Overall

The License Summary - Overall report shows license data grouped by product in a format equivalent to the License Summary tab of the Microsoft License Statement (MLS) spreadsheet.

Columns

- Manufacturer
- Product
- Version
- Effective License Quantity
- Upgrade License Quantity
- Upgrade License Quantity (w/Maintenance)
- Active SA Quantity

You can drill-down to;

- License Summary - By Country report.
- License Summary - By Business Unit report.
- License Summary - By Environment report.
- Transaction Summary report.

License Summary - By Business Unit

The License Summary - By Business Unit report shows license data grouped by Business Unit in a format equivalent to the License Summary tab of the Microsoft License Statement (MLS) spreadsheet.

Columns

- Business Unit
- Manufacturer
- Product
- Version
- Effective License Quantity
- Upgrade License Quantity
- Upgrade License Quantity (w/Maintenance)
- Active SA Quantity

You can drill down to the License Summary Detail report.

License Summary - By Country

The License Summary - By Country report shows license data grouped by country in a format equivalent to the License Summary tab of the Microsoft License Statement (MLS) spreadsheet.

Columns

- Country of Usage
- Manufacturer
- Product
- Version
- Effective License Quantity
- Upgrade License Quantity
- Upgrade License Quantity (w/Maintenance)
- Active SA Quantity

You can drill down to the License Summary Detail report.

License Summary - By Environment

The License Summary - By Environment report shows license data grouped by Environment in a format equivalent to the License Summary tab of the Microsoft License Statement (MLS) spreadsheet.

Columns

- Environment
- Manufacturer
- Product

- Version
- Effective License Quantity
- Upgrade License Quantity
- Upgrade License Quantity (w/Maintenance)
- Active SA Quantity

You can drill down to the License Summary Detail report.

License Summary - Detail

The License Summary - Detail report shows license data with Country of Usage, Business Unit and Environment details, in a format equivalent to the License Summary tab of the Microsoft License Statement (MLS) spreadsheet.

Columns

- Country of Usage
- Business Unit
- Environment
- Manufacturer
- Product
- Version
- License
- Effective License Quantity
- Upgrade License Quantity
- Upgrade License Quantity (w/Maintenance)
- Active SA Quantity

License Summary - Transaction Summary

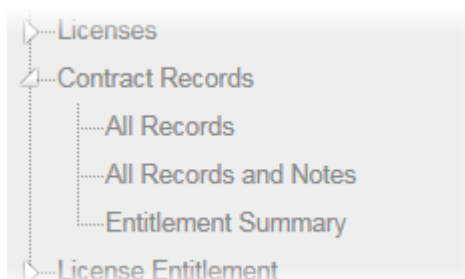
The License Summary - Transaction Summary report shows license data by license model and license program in a format equivalent to the Transaction Summary tab of the Microsoft License Statement (MLS) spreadsheet.

Columns

- Country of Usage
- Manufacturer
- Product
- License Version
- License Model
- License Program
- Effective License Quantity
- Upgrade License Quantity
- Upgrade License Quantity (w/Maintenance)

Contract Records

Contract records reports allow you to display, collate and sort data collected in the contract records workspace of License Manager. Access the reports using the links in the navigation menu:



Contract Records - All Records

The Contract Records - All Records report shows all items in the Contract Records workspace.

Columns

- Contract ID
- Manufacturer
- Contract Name
- Contract Number
- PO Number
- Owner
- Review Date
- Start Date
- End Date
- Status
- Days to Review
- Days to Expiry
- Contract Cost
- Cost Per Year
- Currency
- Reseller
- Reseller Contact
- Business Unit

Contract Records - All Records and Notes

The Contract Records - All Records report shows all items in the Contract Records workspace with notes.

Columns

- Contract ID

- Manufacturer
- Contract Name
- Contract Number
- PO Number
- Owner
- Review Date
- Start Date
- End Date
- Status
- Days to Review
- Days to Expiry
- Contract Cost
- Cost Per Year
- Currency
- Reseller
- Reseller Contact
- Business Unit
- Notes

Contract Records - Entitlement Summary

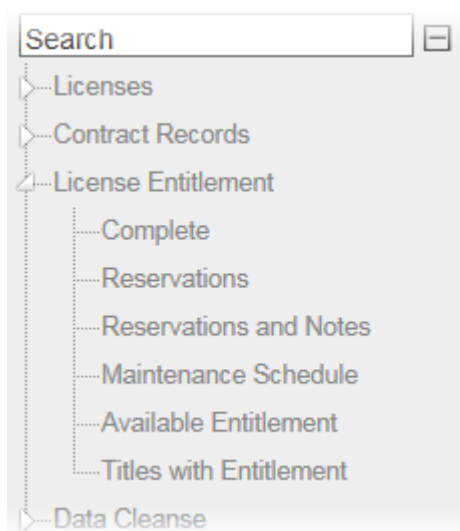
The Contract Records - Entitlement Summary report lists product entitlement from contracts held.

Columns

- Manufacturer
- Contract Name
- Contract Number
- Status
- Product
- Version
- Entitlement Qty
- License Metric
- Maint Expiry
- Is Academic

License Entitlement

License entitlement reports allow you to display, collate and sort data relating to the license entitlement workspace of License Manager. Access the reports using the links in the navigation menu:



License Entitlement - Complete

The License Entitlement - Complete report shows license entitlement granted by licenses held and contracts held.

Columns

- Manufacturer
- Product
- Version
- Qualification
- Entitlement Qty
- License Metric
- Allocated Qty
- Reserved Qty
- On Order
- Total Available
- Maint Qty
- Maint Expiry
- Is Contract
- Country of Use
- Environment
- Business Unit

License Entitlement - Reservations

The License Entitlement - Reservations report shows license entitlement that has been reserved.

Columns

- Manufacturer

- Product
- Version
- Qualification
- License Metric
- Reserved Qty
- Reserved For
- Reserved By
- Reference Number
- Business Unit

License Entitlement - Reservations and Notes

The License Entitlement - Reservations report shows license entitlement that has been reserved with notes.

Columns

- Manufacturer
- Product
- Version
- Qualification
- License Metric
- Reserved Qty
- Reserved For
- Reserved By
- Reference Number
- Business Unit
- Notes

License Entitlement - Maintenance Schedule

The License Entitlement - Maintenance Schedule report shows licenses that have maintenance agreements and the number of days until the maintenance expires.

Columns

- Manufacturer
- Product
- Version
- Qualification
- License Metric
- Maintenance Qty
- Maintenance Expiry
- Is Contract
- Status
- Days to Expiry
- Business Unit

- License IDs

License Entitlement - Available Entitlement

The License Entitlement - Available Entitlement report shows licenses that are not assigned to installs and are not reserved.

Columns

- Manufacturer
- Product
- Version
- Qualification
- Total Available
- License Metric
- Business Unit
- Country of Use
- Environment

License Entitlement - Titles with Entitlement

The License Entitlement - Titles with Entitlement report shows a breakdown of products with available license entitlement

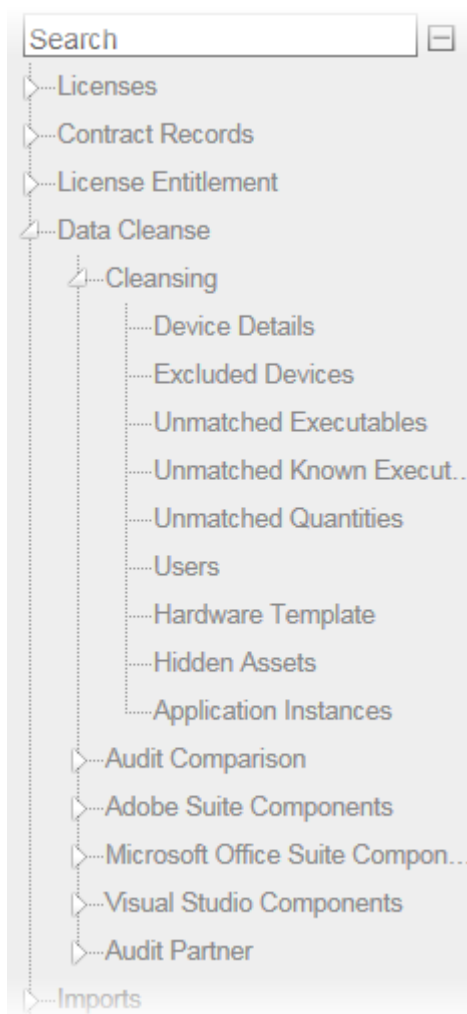
Columns

- Manufacturer
- Product
- Version
- Entitlement Qty
- Allocated Qty
- Reserved Qty
- On Order
- Maint Qty
- Earliest Maint Expiry

You can drill down to the License Entitlement - Complete report.

Cleansing

Cleansing reports allow you to display, collate and sort data collected in the data cleanse workspace of License Manager. Access the reports using the links in the navigation menu:



Cleansing - Device Details

The Cleansing - Device Details by Audit Run report shows the details of devices discovered in your organization.

Please note; this does not include Oracle application instance devices.

Columns

- Device Name
- Business Unit
- Country of Use
- Environment
- Type
- Class
- Platform
- Host
- Has Installs

- Is Managed
- Bookmark
- Domain
- OS
- Service Pack
- Total Files
- Unidentified
- First IP
- Make
- Model
- Serial Number
- CPU
- Physical
- Cores
- Threads
- Logical
- CPU Speed
- RAM
- BIOS Date
- OS Mobility
- TS Enabled
- Last User
- Last Seen
- User Spec 1
- User Spec 2
- User Spec 3
- User Spec 4

Cleansing - Excluded Devices

The Cleansing - Excluded Devices report shows the details of devices with their environment marked as excluded. Devices are excluded if they are being decommissioned. This prevents them from being updated in the Software Usage workspace.

Columns

- Device Name
- Business Unit
- Country of Use
- Environment
- Type
- Class
- Platform
- Host
- Has Installs
- Is Managed

- Bookmark
- Domain
- OS
- Service Pack
- Total Files
- Unidentified
- First IP
- Make
- Model
- Serial Number
- CPU
- Physical
- Cores
- Threads
- Logical
- CPU Speed
- RAM
- BIOS Date
- OS Mobility
- TS Enabled
- Last User
- Last Seen
- User Spec 1
- User Spec 2
- User Spec 3
- User Spec 4

Cleansing - Unmatched Executables

The Cleansing - Unmatched Executables report shows details of unmatched .EXE files in the selected Audit Run.

Columns

- Business Unit
- Computer Name
- Path
- Filename
- Size

Cleansing - Unmatched Known Executables

The Cleansing - Unmatched Known Executables report shows details of unmatched known .EXE files in the selected Audit Run.

Columns

- Business Unit
- Computer Name
- Manufacturer
- Product
- Filename
- Size

Cleansing - Unmatched Quantities

The Cleansing - Unmatched Quantities report shows quantities of unmatched .EXE files in the selected Audit Run.

Columns

- Business Unit
- Filename
- Size
- Unmatched Qty

Cleansing - Users

The Cleansing - Users report shows all users on devices with products installed for the user

Columns

- Business Unit
- User Name
- Has Installs

Cleansing - Hardware Template

The Cleansing - Hardware Template report shows device details for any business unit on a given date

Please note; this does not include Oracle application instance devices.

Columns

- Domain Name
- Device Name
- Operating System
- Device Type
- Service Pack
- IP Address
- Physical or Virtual
- Make
- Model Serial Number
- CPU Name
- Number Physical CPUs
- Number Logical CPUs
- RAM in Bytes
- Last Logged On User
- Last Seen Data
- Environment
- Physical Host
- Business Unit
- Country Of Use
- OS Mobility
- Terminal Server
- Platform
- CPU Speed in MHz
- CPU Cores
- CPU Threads
- BIOS Date
- User Spec 1
- User Spec 2
- User Spec 3
- User Spec 4
- IBM PVU
- Virtualization Type
- Multi Threading Enabled

Cleansing - Hidden Assets

The Cleansing - Hidden Assets report displays all assets which are hidden

Columns

- Asset Name
- Business Unit
- Country Of Use
- Environment Name
- Type
- Class
- Platform
- Host
- Domain
- OS
- Service Pack
- First IP
- Make
- Model
- Serial Number
- Install Source Name
- Decommissioned Date
- Last Imported

Cleansing - Application Instances

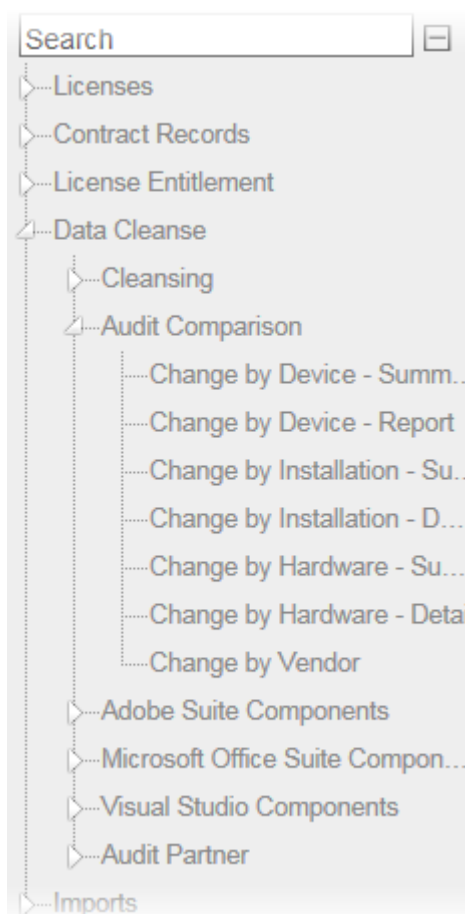
The Cleansing - Application Instances report displays all Oracle application instances for your organization

Columns

- Application Instance
- Class
- Host
- Host Type
- Host Is Valid
- Business Unit

Audit Comparison

Audit comparison reports allow you to display, collate and sort audit comparison data in the data cleanse workspace. Access the reports using the links in the navigation menu:



Audit Comparison - Change by Device - Summary

The Audit Comparison - Change by Device - Summary report shows the numbers of devices that have been added or removed between selected dates.

Please note; this does not include Oracle application instance devices.

Columns

- Audit 1 Total
- Audit 2 Total
- Total Change
- Added
- Removed
- Unchanged
- Deployed By
- Country of Use
- Environment

You can drill down to the Audit Comparison - Change by Device - Detail report.

Audit Summary - Change by Device - Detail

The Audit Comparison - Change by Device - Detail report shows the Devices that have been added or removed between selected dates.

Please note; this does not include Oracle application instance devices.

Columns

- Device Name
- Device Status
- Deployed By
- Country of Use
- Environment columns

You can drill down to the Audit Comparison - Change by Installation report.

Audit Comparison - Change by Installation - Summary

The Audit Comparison - Change by Installation - Summary report shows Products that have been installed or removed from Devices between selected dates.

Columns

- Manufacturer
- Product
- Version
- Audit 1 Total
- Audit 2 Total
- Total Change
- Added
- Removed
- Unchanged
- Deployed By
- Country of Use
- Environment columns

You can drill down to the Audit Comparison - Change by Installation report.

Audit Comparison - Change by Installation - Detail

The Audit Comparison - Change by Installation - Detail report shows the details of Devices and Products that have been installed or removed between selected dates.

Columns

- Device Name

- Manufacturer
- Product
- Version
- Is Licensable
- Device Status
- Product Status
- Deployed By
- Country of Use
- Environment

Audit Comparison - Change by Hardware - Summary

The Audit Comparison - Change by Hardware - Summary report shows changes made to Devices between selected dates.

Columns

- Device Name
- Audits
- Device Status
- Changes
- First Audit Run
- Last Audit Run

Audit Comparison - Change by Hardware - Detail

The Audit Comparison - Change by Hardware - Detail report shows the details of changes made to Devices between selected dates.

Columns

- Device Name
- Audits
- Device Status
- Attribute Name
- Changes
- First Value
- Last Value
- First Audit Run
- Last Audit Run

Audit Comparison - Change by Vendor

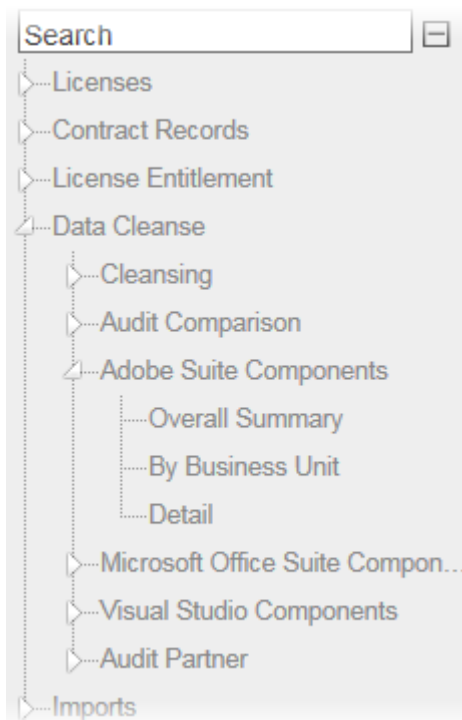
The Audit Comparison - Change by Vendor report shows the details of Product Vendors that have been installed or removed between selected dates.

Columns

- Manufacturer
- Vendor Status

Adobe Suite Components

Adobe Suite Components reports can be used to identify common deployment scenarios for the organization's Adobe products. Access the reports using the links in the navigation menu:



Adobe Suite Components- Overall Summary

The Adobe Suite Components - Overall Summary report shows the number of Adobe Suite Products installed on devices in the organization. The report shows a breakdown of Product versions. It is based on the last completed Audit.

You can drill down to the Adobe Suite Components - Detail report.

Adobe Suite Components - By Business Unit

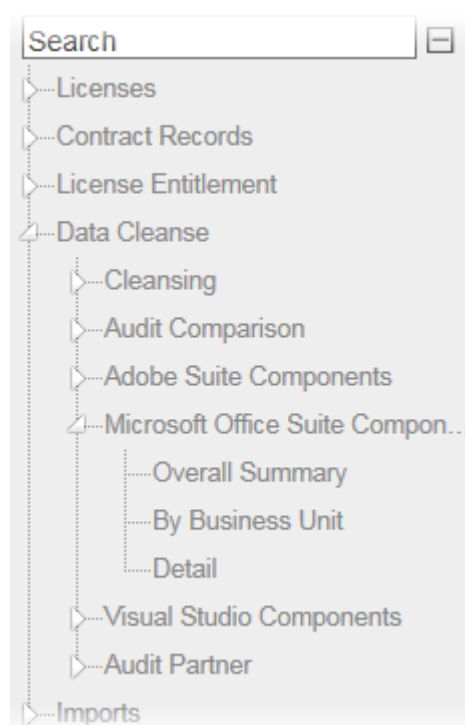
The Adobe Suite Components - By Business Unit report shows the number of Adobe Suite Products installed on devices in the organization. The report is broken down by Business Unit and Product versions. It is based on the last completed Audit.

Adobe Suite Components - Detail

The Adobe Suite Components - Detail report shows the number of Adobe Suite Products installed on devices in the organization. The report is broken down by individual Devices and Product versions. It is based on the last completed Audit.

Microsoft Office Suite Components

Microsoft Office suite components reports can be used to identify common deployment scenarios for the organization's Microsoft Office products. Access the reports using the links in the navigation menu:



Microsoft Office Suite Components - Overall Summary

The Microsoft Office Suite Components - Overall Summary report shows the number of Office Suite Products installed on devices in the organization. The report shows a breakdown of Product versions. It is based on the last completed Audit.

You can drill down to the Microsoft Office Suite Components - Detail report.

Microsoft Office Suite Components - By Business Unit

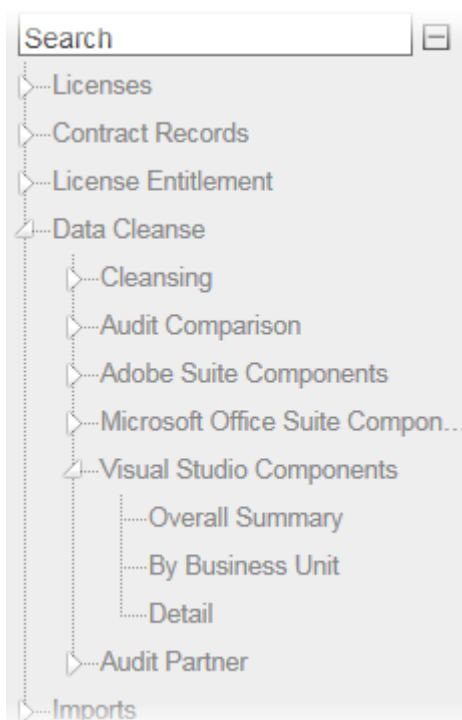
The Microsoft Office Suite Components - By Business Unit report shows the number of Office Suite Products installed on devices in the organization. The report is broken down by Business Unit and Product versions. It is based on the last completed Audit.

Microsoft Office Suite Components - Detail

The Microsoft Office Suite Components - Detail report shows the number of Office Suite Products installed on devices in the organization. The report is broken down by individual Devices and Product versions. It is based on the last completed Audit.

Visual Studio Components

Visual Studio components reports can be used to identify common deployment scenarios for the organization's Visual Studio products. Access the reports using the links in the navigation menu:



Visual Studio Components - Overall Summary

The Visual Studio Components - Overall Summary report shows the number of Visual Studio Products installed on devices in the organization. The report shows a breakdown of Product versions. It is based on the last completed Audit.

You can drill down to the Visual Studio Components - Detail report.

Visual Studio Components - By Business Unit

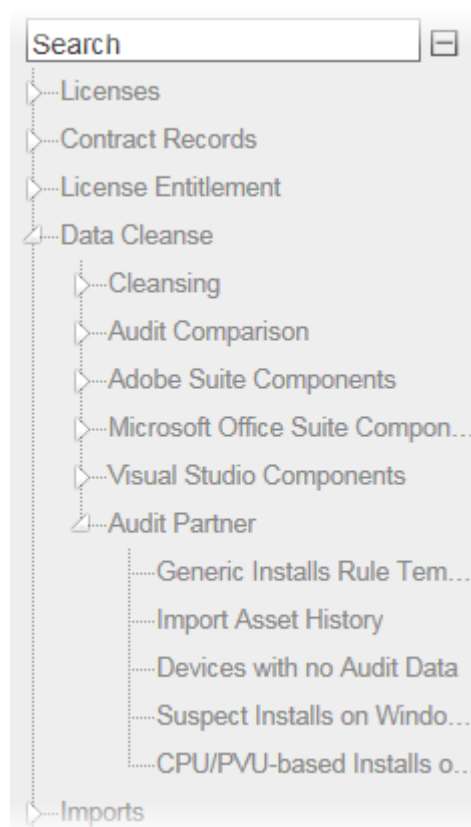
The Visual Studio Components - By Business Unit report shows the number of Visual Studio Products installed on devices in the organization. The report is broken down by Business Unit and Product versions. It is based on the last completed Audit.

Visual Studio Components - Detail

The Visual Studio Components - Detail report shows the number of Visual Studio Products installed on devices in the organization. The report is broken down by individual Devices and Product versions. It is based on the last completed Audit.

Audit Partner

Audit partner reports allow you to display, collate and sort data from the data cleanse workspace in License Manager. These reports are often requested by an auditor to determine your compliance position. Access the reports using the links in the navigation menu:



Audit Partner Generic Installs Rule Template

The Audit Partner Generic Installs Rule Template report shows Generic Products Installed on Devices in the Organization

Please note; this does not include Oracle application instance devices.

Columns

- Manufacturer
- Product
- Version

- Device Name
- Device Tag
- Deployed By
- Country of Use
- Environment

Audit Partner - Import Asset History

The Audit Partner - Import Asset History report shows the number of devices imported to License Manager.

Columns

- Import Date
- Device Count

Audit Partner - Devices with no audit data

The Audit Partner - Devices with no audit data report shows devices with no audit data.

Please note; this does not include Oracle application instance devices.

Columns

- Device Name
- OS
- Service Pack
- Class
- Device Type
- Serial Number
- Last Seen Date

Audit Partner - Suspect Installs on Windows 2003/XP Devices

The Audit Partner - Suspect Installs on Windows 2003/XP Devices report shows products with a processor or core license metric installed on Windows 2003 or XP devices.

Columns

- Asset Name
- Manufacturer
- Product
- Version
- License Metric
- OS
- CPU
- Physical
- Cores

- Threads
- Logical

Audit Partner - CPU/PVU-based Installs on Virtual Devices with no host

CPU/PVU-based Installs on Virtual Devices with no host report shows products with a physical processor, core or PVU license metric installed on virtual devices with no host.

Columns

- Asset Name
- Manufacturer
- Product
- Version
- License Metric
- CPU
- Physical
- Cores
- Threads
- Logical
- PVU

Imports

Imports reports allow you to display, collate and sort data about the data you have imported in the assets workspace of License Manager. Access the reports using the links in the navigation menu:



Data Feed Summary

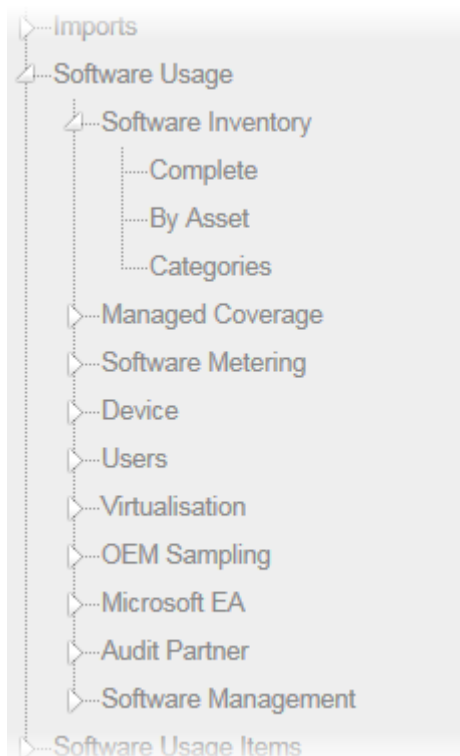
The Data Feed Summary report shows details associated with each type of data source imported into the assets workspace.

Columns

- Data Feed
- Last Import
- Last Asset Count

Software Inventory Reports

Software inventory reports allow you to display, collate and sort software installation data from the software usage workspace of License Manager. Access the reports using the links in the navigation menu:



Software Inventory - Complete

The Software Inventory - Complete report shows all installed software in the organization.

Columns

- Manufacturer
- Product
- Version
- Category
- License Metric
- Usage Qty
- License Qty
- Discovered Metric
- Compliance
- Deployed By
- Managed By
- Country of Use
- Environment

- Status
- Responsibility
- Identified Manually
- Don't Track
- Stage

Software Inventory - by Asset

The Software Inventory by Asset report shows installed software on all Devices in the organization.

Columns

- Device Name
- Manufacturer
- Product
- Version
- Is Licensable
- Category
- Status
- Don't Track
- Deployed By
- Managed By
- Country of Use
- Environment
- Responsible
- Install Type

Software Inventory - Categories

The Software Inventory Categories report shows the categories for installed software in the organization.

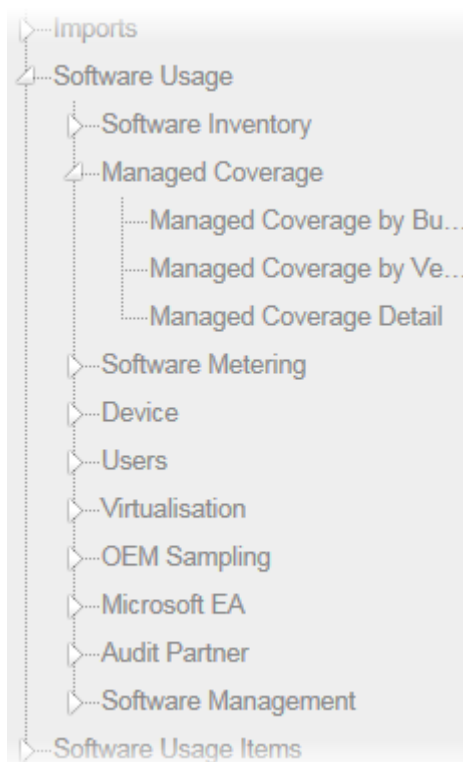
Columns

- Category
- Usage Quantity

You can drill down to the Software Inventory - Complete report.

Managed Coverage

Managed coverage reports allow you to display, collate and sort software installation data for managed software in the software usage workspace of License Manager. Access the reports using the links in the navigation menu:



Managed Coverage by Business Unit

The Managed Coverage by Business Unit report shows a summary of managed software usage broken down by business unit

Columns

- Business Unit
- Managed Installs
- Installs
- Install Coverage

You can drill down to the Managed Coverage Detail report.

Managed Coverage by Vendor

The Managed Coverage by Business Unit report shows a summary of managed software usage broken down by vendor

Columns

- Vendor
- Installs
- Managed Installs
- Install Coverage

You can drill down to the Managed Coverage Detail report.

Managed Coverage Detail

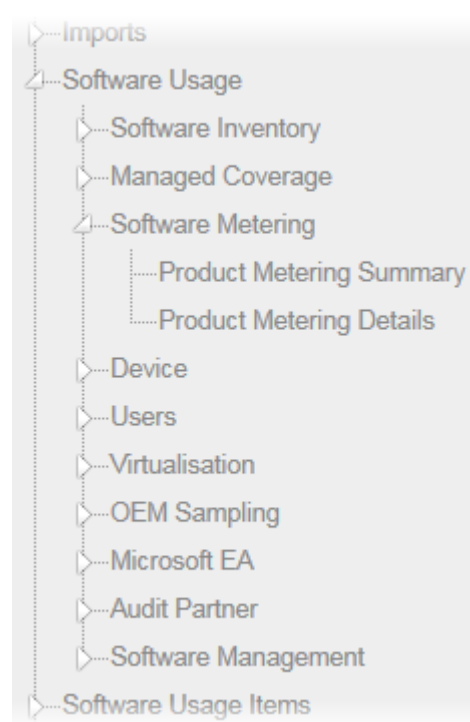
The Managed Coverage Detail report shows a summary of managed software usage

Columns

- Business Unit
- Vendor
- Installs
- Managed Installs
- Install Coverage

Software Metering Reports

The software metering reports section contains metered product reports. Access the reports using the links in the navigation menu:



Software Metering - Product Metering Summary

The Software Metering - Product Metering Summary report shows a summary of usage details of all Products in an organization.

Columns

- Business Unit

- Manufacturer
- Product
- Version
- Install Type
- Avg Last Usage
- Avg Usage Count
- Total
- Over 90 Days
- Within 90 Days
- Within 60 Days
- Within 30 Days
- Within 7 Days

Software Metering - Product Metering Details

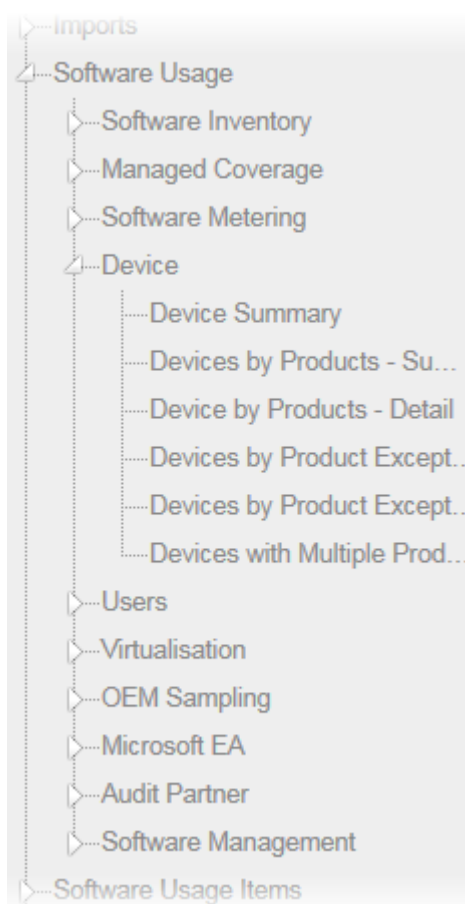
The Software Metering - Product Metering Details report shows Product usage details on all Devices in an organization.

Columns

- Business Unit
- Install Type
- Device Name
- Manufacturer
- Product
- Version
- Last Used Date
- Last Used Days
- Usage Count
- Usage Time
- Last User

Device Reports

Device reports allow you to display, collate and sort device data in the assets workspace of License Manager. Access the reports using the links in the navigation menu:



Device - Device Summary

The Device - Device Summary report displays the number of devices in each area of an organization.

Columns

- Country of Use
- Business Unit
- Environment
- Device Type
- Virt/Phys
- OS
- Count

You can drill down to the Device - Device Details report.

Device - Devices by Products - Summary

The Device - Devices by Products - Summary report allows you to search for Products to show the number of devices they are installed on.

Columns

- Products
- Device Count

The match all products tick box allows you to only display devices that contain all of the products in the search.

You can drill down to the Device - Devices by Products - Detail report.

Device - Devices by Products - Detail

The Device - Devices by Products - Detail report allows you to search for Products and display the details of the devices they are installed on.

Columns

- Device Name
- Products
- Match Count
- Environment
- Class
- Platform
- Domain
- OS
- Service Pack
- Virt/Phys
- Physical Host
- Make
- Model
- Serial Number
- CPU
- Physical
- Cores
- Threads
- Logical
- CPU Speed
- RAM
- BIOS Date
- First IP
- Last User
- Last Seen
- Deployed By
- Country of Use
- User Spec 1
- User Spec 2
- User Spec 3

- User Spec 4

The match all products tick box allows you to only display devices that contain all of the products in the search.

Devices - Devices by Product Exceptions - Summary

The Devices - Devices by Product Exceptions - Summary report shows the number of devices where a product is not installed.

Columns

- Device Count

You can drill down to the Device - Devices by Product Exceptions - Detail report.

Devices - Devices by Product Exceptions - Detail

The Devices - Devices by Product Exceptions - Detail report shows device details for devices with product exceptions.

Columns

- Device Name
- Environment
- Class
- Platform
- Domain
- OS
- Service Pack
- Virt / Phys
- Physical Host
- Make
- Model
- Serial Number
- CPU
- Physical
- Cores
- Threads
- Logical
- CPU Speed
- RAM
- BIOS Date
- First IP
- Last User
- Last Seen
- Deployed By

- Country of Use
- User Spec 1
- User Spec 2
- User Spec 3
- User Spec 4

Devices - Devices with Multiple Product Versions

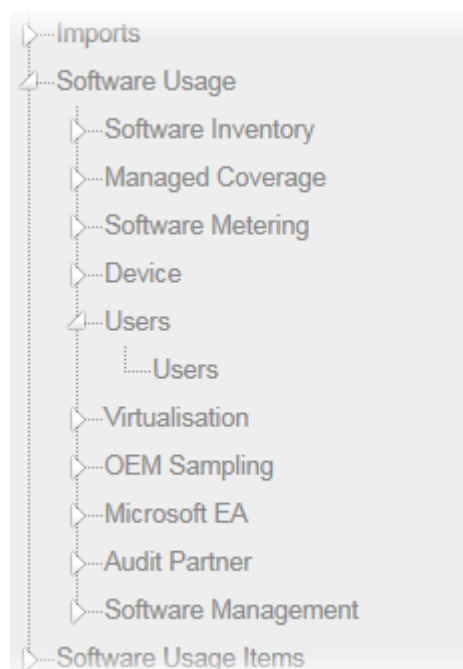
The Device - Devices with Multiple Product Versions report shows devices that have more than one version of any software product installed.

Columns

- Device Name
- Manufacturer
- Product
- Version Count
- Deployed By
- Country of Use
- Environment

Users Reports

The users reports contains reports about users of software usage items. Access the reports using the links in the navigation menu:



Users - Users

The Users - Users report shows all users with software usage items allocated to them.

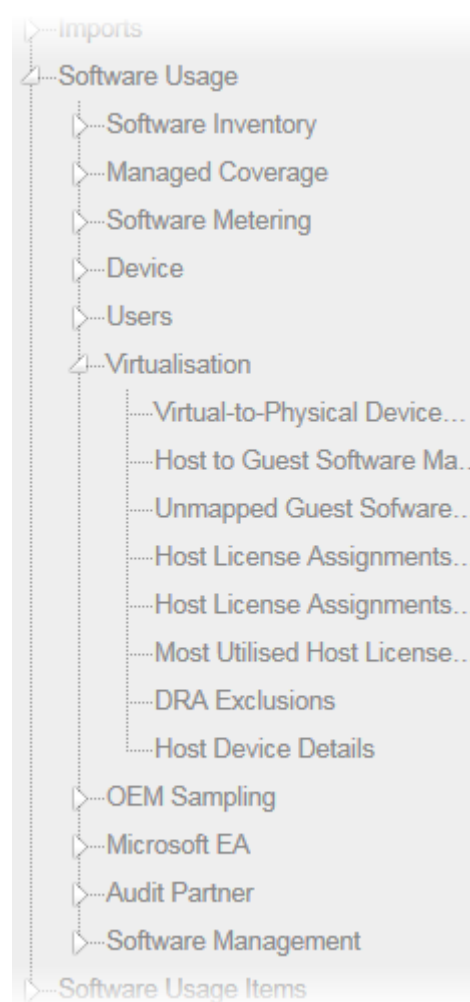
Columns

- Business Unit
- User Name
- Software Usage Items

You can drill down to the [Software Usage Items - Software Usage Items report](#).

Virtualization Reports

Virtualization reports allow you to display, collate and sort data relating to your organization's virtual servers. Access the reports using the links in the navigation menu:



Virtualization - Virtual-to-Physical Device Relationships

The Virtualization - Virtual-to-Physical Device Relationships report shows the details of the organization's virtual machines and their physical hosts.

Columns

- Virt. Device Name
- Virt. Environment
- Virt. Device Type
- Virt. Domain
- Virt. OS
- Virt. Service Pack
- Virt. Make
- Virt Model
- Phys. Name
- Phys. Environment
- Phys. Device Type
- Phys. Domain
- Phys. OS
- Phys. Service Pack
- Phys. Make
- Phys. Model

Virtualization - Host to Guest Software Mapping Detail

The Virtualization - Host to Guest Software Mapping Detail report shows details of Software on Guest Devices that have been mapped to a Host Device.

Columns

- Mapped Host Device Name
- Host Manufacturer Name
- Host Product Name
- Host Version
- Host License Metric Name
- Host Quantity
- Host Release Date
- Guest Device Name
- Guest Manufacturer Name
- Guest Product Name
- Guest Version
- Guest License Metric Name
- Guest Quantity
- Is Phantom

Virtualization - Unmapped Guest Software Usage

The Virtualization - Unmapped Guest Software Usage report shows unmapped Software Usage on a Guest Device.

Columns

- Device Name
- Business Unit
- Country Of Usage
- Environment
- Device Type
- Manufacturer Name
- Product Name
- Version
- License Metric Name
- Quantity
- Is Phantom

Virtualization - Host License Assignments with Unmapped Guest Usage

The Host License Assignments with Unmapped Guest Usage report shows Host Devices with auto-mapping rules for its guest devices where installs of a product on a guests has not been mapped.

Columns

- Business Unit
- Host Device
- Host Manufacturer
- Host Product
- Host Version
- Host Quantity
- Host Metric
- Host Upper Limit
- Guest Device
- Is Phantom
- Guest Manufacturer
- Guest Product
- Guest Version
- Guest Quantity
- Guest Metric
- Reason

Virtualization - Host License Assignments with Surplus Guest Allowance

The Host License Assignments with Surplus Guest Allowance reports shows Host Devices with surplus licenses assigned for guest usage.

Columns

- Business Unit
- Device
- Manufacturer
- Product
- Version
- Quantity
- Metric
- Upper Limit
- Guest Metric
- Mapped Count

Virtualization - Most Utilized Host License Agreements

The Virtualization - Most Utilized Host License Agreements report shows the most used host license agreements by virtual devices

Columns

- Business Unit
- Device
- Manufacturer
- Product
- Version
- Metric
- Quantity
- Map Count

Virtualization - DRA Exclusions

The Virtualization - DRA Exclusions report shows virtual devices which have been excluded from a physical host that resides in a DRA active Cluster. *For example where a rule has been set to restrict the movement of a specific virtual machine in order to reduce liability.*

Columns

- Device Name
- Physical Host
- DRA Host
- Type

- Class
- Platform
- Business Unit
- Country of Use
- Environment
- OS
- Service Pack
- Make
- Model
- CPU
- Physical
- Cores
- Threads
- Logical
- CPU Speed
- RAM
- BIOS Date
- User Spec 1
- User Spec 2
- User Spec 3
- User Spec 4

Virtualization - Host Device Details

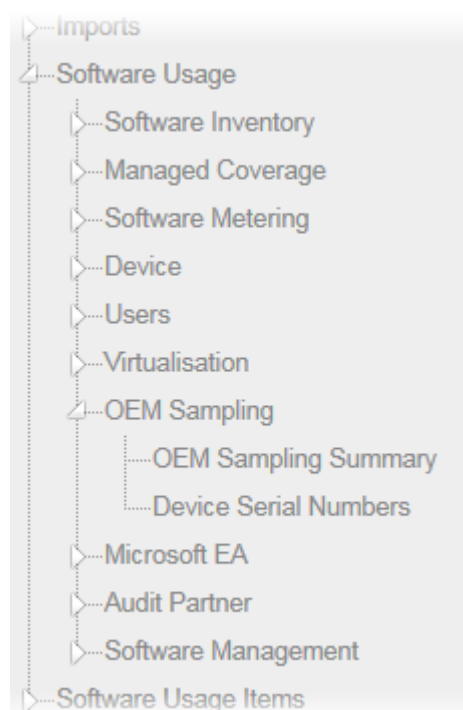
The Host Device Details report shows details of all host servers in your network.

Columns

- Asset Name
- Business Unit
- Host
- Domain
- OS
- Service Pack
- Make
- Model
- Serial Number
- CPU
- Physical
- Cores
- Threads
- Logical
- CPU Speed

OEM Sampling

The OEM sampling reports show original equipment manufacturer data of an organization's devices. Access the reports using the links in the navigation menu:



OEM Sampling - OEM Sampling Summary

The OEM Sampling - OEM Sampling Summary report shows a summary of an organization's devices. The Report shows the number of devices for each combination of make and model. An example device name and serial number are given to aid identification.

Columns

- Make
- Model
- Devices
- Example Device Name
- Example Serial Number

OEM Sampling - Device Serial Numbers

The OEM Sampling - Device Serial Numbers report shows details of the organization's devices and includes serial numbers where available.

Columns

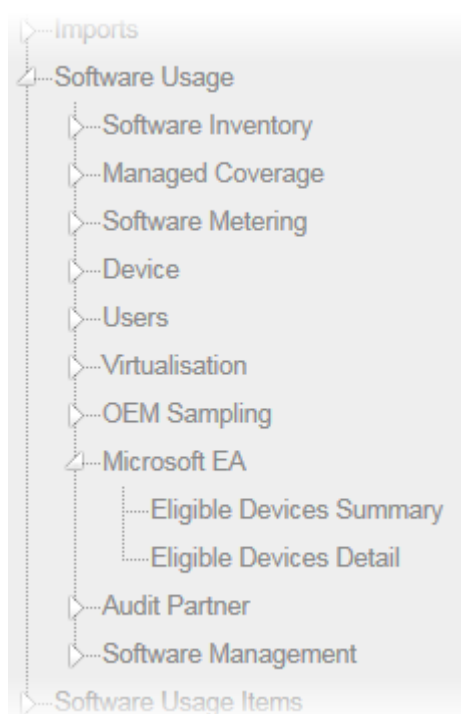
- Make
- Model

- Device Name
- Serial Number
- BIOS Date
- Country of Use
- Environment

You can drill down to the Device - Device Details report.

Microsoft EA

Microsoft EA reports allow you to display, collate and sort eligible device data relating to your organization's true-ups. Access the reports using the links in the navigation menu:



Microsoft EA - Eligible Devices Summary

The Microsoft EA - Eligible Devices Summary report shows the numbers of devices eligible for the True-up process.

Columns

- Business Unit
- Country of Use
- Environment Name
- Bookmark
- Count

You can drill down to the Eligible Devices Detail report.

Microsoft EA - Eligible Devices Detail

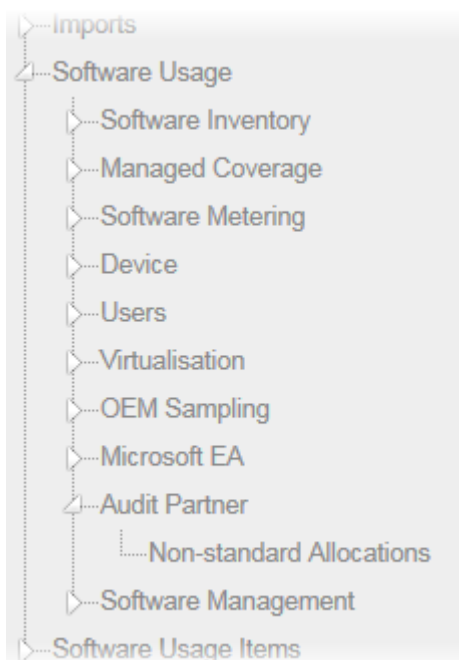
The Microsoft EA - Eligible Devices Detail Report shows the details of devices eligible for the True-up process.

Columns

- Business Unit
- Country of Use
- Environment Name
- Device Name
- Device Type
- Host Name
- Bookmark

Audit Partner Reports

Audit partner reports allow you to display, collate and sort data from the software usage workspace in License Manager. These reports are often requested by an auditor to determine your compliance position. Access the reports using the links in the navigation menu:



Audit Partner - Non-standard Allocations

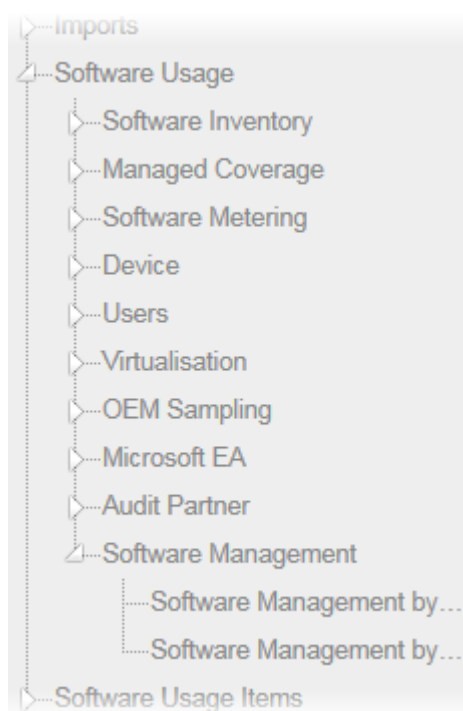
The Audit Partner - Non-standard Allocations report shows installed software with allocated licenses from a different Manufacturer or Product family.

Columns

- Business Unit
- Country of Use Name
- Environment Name
- License ID
- License Name
- License Manufacturer
- License Product
- License Version
- Install Manufacturer
- Install Product
- Install Version
- Quantity Products Installed

Software Management

The software management reports section contains software management reports. Access the reports using the links in the navigation menu:



Software Management By Vendor

The Software Management By Vendor Report shows the software management details for products by the vendor they are sourced from.

Columns

- Manufacturer
- Has Managed
- Has Unmanaged
- Managed Products
- Partially Managed Products
- Unmanaged Products

You can drill-down to;

- Software Management - Software Management By Product Family report
- Software Inventory - Complete report

Software Management By Product Family

The Software Management By Product Family report shows the software management details for products by the vendor they are sourced from.

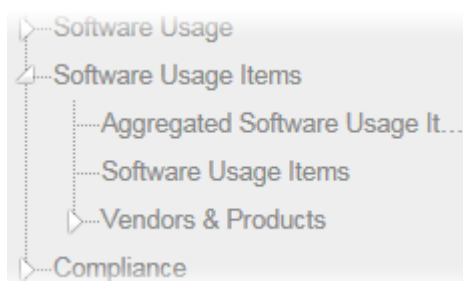
Columns

- Manufacturer
- Product Family
- Has Managed
- Has Unmanaged
- Managed Versions
- Partially Managed Versions
- Unmanaged Versions

Delete this text and replace it with your own content.

Software Usage Items Reports

Software usage reports allow you to display, collate and sort data from the software usage workspace of License Manager. Access the reports using the links in the navigation menu:



Software Usage Items - Aggregated Software Usage Items

The Software Usage Items - Aggregated Software Usage Items report shows products discovered in an Audit Run aggregated by product type.

Columns

- Business Unit
- Country
- Environment
- Manufacturer
- Product
- Version
- Is Licensable
- License Metric Name
- Install Type Name
- Install Source Name
- Install Status Name
- Quantity

You can drill down to the Software Usage Items - Software Usage Items report, filtered by the details of the item.

Software Usage Items - Software Usage Items

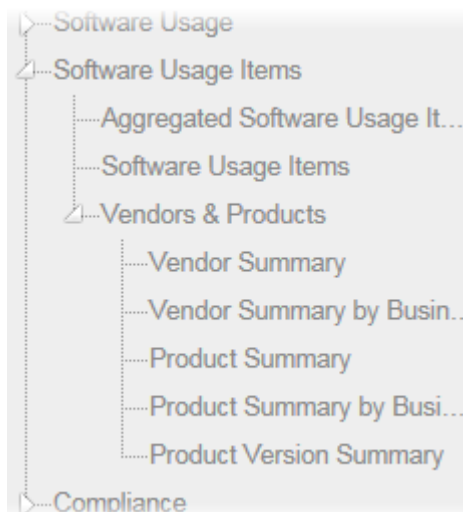
The Software Usage Items - Software Usage Items report shows products discovered in an Audit Run. Products are displayed for every device they are installed on

Columns

- Business Unit
- Country
- Environment
- Computer Name
- Manufacturer
- Product
- Version
- Is Licensable
- Quantity
- License Metric Name
- Install Type Name
- Install Source Name
- Install Status Name

Vendors & Products Reports

Vendors & products reports allow you to display, collate and sort vendor and product data from the software usage workspace of License Manager. Access the reports using the links in the navigation menu:



Vendors & Products - Vendor Summary

The Vendors & Products - Vendor Summary report shows a summary of all the software vendors that are used by the organization and the number of used products for each vendor.

Columns

- Manufacturer
- Active Products

You can drill-down to;

- Vendors & Products - Product Summary report.
- Vendors & Products - Vendor Summary by Business Unit report.

Vendors & Products - Vendor Summary by Business Unit

The Vendors & Products - Vendor Summary by Business Unit report shows a summary of all the software vendors that are used by the organization and the number of used products for each vendor. The list is broken down by Business Unit.

Columns

- Business Unit
- Country of Use
- Environment
- Manufacturer

- Active Products

Vendors & Products - Product Summary

The Vendors & Products - Product Summary report shows a summary of all the Products that are used by the organization and the number of used product versions for each vendor.

Columns

- Manufacturer
- Product
- Active Versions

You can drill-down to;

- Vendors & Products - Product Summary by Business Unit report.
- Software Inventory - by Device report.

Vendors& Products - Product Summary by Business Unit

The Vendors & Products - Product Summary by Business Unit report shows a summary of all the Products that are used by the organization and the number of used product versions for each vendor. The list is broken down by Business Unit.

Columns

- Business Unit
- Country of Use
- Environment
- Manufacturer
- Product
- Active Versions

You can drill down to the Software Inventory - by Device report.

Vendors& Products - Product Version Summary

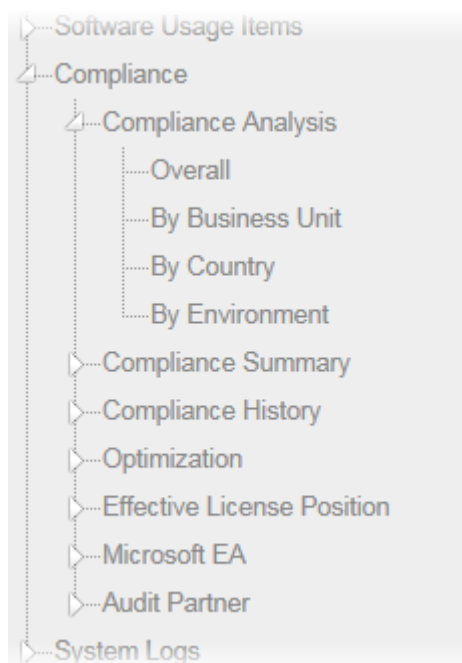
The Vendors & Products - Product Version Summary report shows a summary of all the Product Versions that are used by the organization for each vendor.

Columns

- Manufacturer
- Product
- Version
- Installs

Compliance Analysis Reports

Compliance analysis reports allow you to display, collate and sort data relating to your organization's compliance status. Access the reports using the links in the navigation menu:



Compliance Analysis - Overall

The Compliance Analysis - Overall report shows the compliance position and quantity of allocated licenses across all products in an organization. The difference between allocated licenses and products is shown.

Columns

- Manufacturer
- Product
- Version
- Discovered Metric
- Usage Quantity
- Licenses Allocated
- License Metric
- Available
- Compliance
- Estimated Shortfall Cost
- Estimated Overspend
- Currency

You can drill-down to;

- Compliance Analysis - By Business Unit report.
- Compliance Analysis - By Country report.
- Compliance Analysis - By Environment report.
- Compliance Summary - Compliance Detail report.

Compliance Analysis - By Business Unit

The Compliance Analysis - By Business Unit report shows the compliance position and quantity of allocated licenses across all products in an organization. The report is broken down by Business Unit and the difference between allocated licenses and products is shown.

Columns

- Deployed By
- Managed By
- Manufacturer
- Product
- Version
- Discovered Metric
- Usage Quantity
- Licenses Allocated
- License Metric
- Available
- Compliance
- Estimated Shortfall Cost
- Estimated Overspend
- Currency

You can drill down to the Compliance Summary - Compliance Detail report.

Compliance Analysis - By Country

The Compliance Analysis - By Country report shows the compliance position and quantity of allocated licenses across all products in an organization. The report is broken down by Country of Use and the difference between allocated licenses and products is shown.

Columns

- Country of Use
- Manufacturer
- Product
- Version
- Discovered Metric
- Usage Quantity
- Licenses Allocated
- License Metric
- Available

- Compliance
- Estimated Shortfall Cost
- Estimated Overspend
- Currency

You can drill down to the Compliance Analysis - Compliance Detail report.

Compliance Analysis - By Environment

The Compliance Analysis - By Environment report shows the compliance position and quantity of allocated licenses across all products in an organization. The report is broken down by Environment and the difference between allocated licenses and products is shown.

Columns

- Environment
- Manufacturer
- Product
- Version
- Discovered Metric
- Usage Quantity
- Licenses Allocated
- License Metric
- Available
- Compliance
- Estimated Shortfall Cost
- Estimated Overspend
- Currency

You can drill down to the Compliance Summary - Compliance Detail report.

Compliance Summary Reports

Compliance summary reports allow you to display, collate and sort compliance and downgraded license data. Access the reports using the links in the navigation menu:



Compliance Summary - Compliance Detail

The Compliance Summary - Compliance Detail report shows the compliance position and quantity of allocated licenses across all products. The difference between allocated licenses and products is shown. The report includes additional Business Unit and Management details.

Columns

- Manufacturer
- Product
- Version
- Discovered Metric
- Usage Quantity
- Licenses Allocated
- License Metric
- Available
- Compliance
- Deployed By
- Managed By
- Country of Use
- Environment
- Responsible
- Estimated Shortfall Cost
- Currency

Compliance Summary - Compliance Downgrades

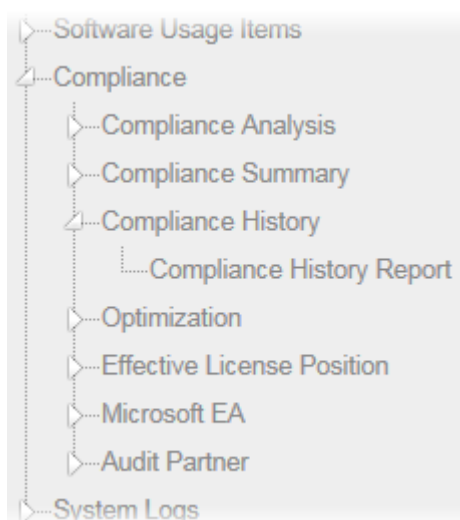
The Compliance Summary - Compliance Downgrades report shows all products using a downgraded license.

Columns

- Manufacturer
- Product (Usage)
- Version (Usage)
- Product (Entitlement)
- Version (Entitlement)
- Qualification
- License Quantity
- License Metric
- Deployed By
- Managed By
- Country of Use
- Environment

Compliance History

Compliance history reports allow you to display, collate and sort historical compliance and downgraded license data. Access the reports using the links in the navigation menu:



Compliance History - Compliance History Report

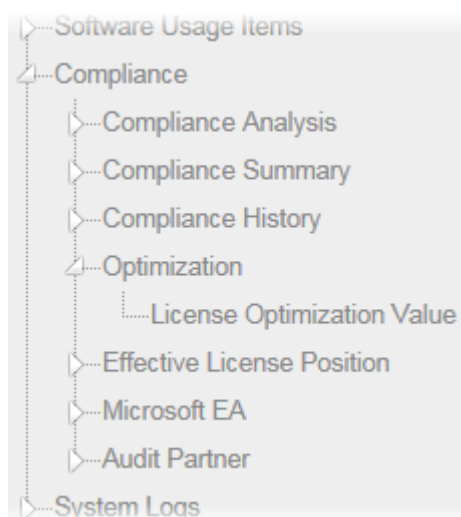
The Compliance History - Compliance History Report shows compliance details for a baseline as set in the software usage workspace.

Columns

- Manufacturer
- Product
- Version
- Business Unit
- Deployed By
- Managed By
- Country Of Use
- Environment
- Discovered Metric
- License Metric
- Responsible
- Is Managed
- Usage Quantity
- License Quantity
- Compliance
- Available
- Estimated Shortfall Cost
- Estimated Overspend

Optimization

Optimization reports allow you to view optimization details for your data. Access the reports using the links in the navigation menu:



Optimization - License Optimization Value

The Optimization - License Optimization Value report shows optimization details regarding your licenses

Columns

- Business Unit
- Manufacturer
- Product
- License Metric
- RRP
- Original Licensed Installs
- Original Total Licenses
- Original Available
- Final Licensed Installs
- Final Total Licenses
- Final Available
- New Usage From Existing Entitlement
- Cost Avoidance

Effective License Position Reports

Effective license position reports allow you to display, collate and sort effective license position data. This shows the number of licenses the organization owns and how this compares with actual usage. These reports are often requested by resellers and manufacturers to determine your compliance position. Access the reports using the links in the navigation menu:



Effective License Position - ELP - Microsoft

The Effective License Position - ELP - Microsoft report shows the Effective License Position for Microsoft products. It provides the complete Actual License Position information Microsoft require.

Columns

- Product Family
- Version
- MLS Volume Licenses
- FPP Licenses
- FPP Upgrades
- OEM Licenses
- Preliminary License Entitlement
- Identified by Inventory Discovery Tool
- Identified Manually
- Total Software Deployment
- Software Deployment vs License Entitlement
- License Allocation (+/-) Upgrades Downgrades etc
- Licensing Delta
- Comments
- Upgrade License Quantity
- Upgrade License Quantity (w/Maintenance)
- Notes

Effective License Position - ELP - All Vendors

The Effective License Position - ELP - All Manufacturers report shows the Effective License Position across all manufacturers.

Columns

- Product Family
- Version
- MLS Volume Licenses
- FPP Licenses
- FPP Upgrades
- OEM Licenses
- Preliminary License Entitlement
- Identified by Inventory Discovered Tool
- Identified Manually
- Total Software Deployment
- Software Deployment vs License Entitlement
- License Allocation (+/-) Upgrades Downgrades etc
- Licensing Delta
- Comments
- Upgrade License Quantity
- Upgrade License Quantity (w/Maintenance)
- Notes

Effective License Position - 2014 ELP - Microsoft

The Effective License Position - 2014 ELP - Microsoft report shows the Effective License Position for Microsoft products. This is the version of the report required from 2014. It provides the complete Actual License Position information Microsoft require.

Columns

- Product Pool
- Product Family
- Version
- Volume Licenses
- Active Software Assurance
- Other License
- FPP Licenses
- OEM Licenses
- License Entitlement
- Discovered by Inventory Discovery Tool Physical
- Discovered by Inventory Discovery Tool Virtual
- CALs / Identified Manually
- Active Software Assurance Requirement
- Total Software Deployed
- License Position before Downgrades
- Downgraded (-) or Downgrades Applied (+)
- Delta
- Comments
- Software Assurance Delta
- Unused Upgrade License
- Unused Upgrades (w/Maintenance)

Effective License Position - 2014 ELP - All Manufacturers

The Effective License Position - 2014 ELP - All Manufacturers report shows the Effective License Position across all manufacturers. This is the version of the report required from 2014.

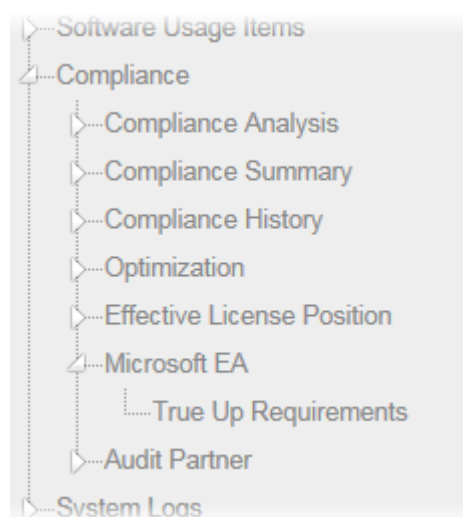
Columns

- Manufacturer
- Product Family
- Version
- Volume Licenses
- Active Software Assurance
- Other License
- FPP Licenses
- OEM Licenses
- License Entitlement
- Discovered by Inventory Discovery Tool Physical

- Discovered by Inventory Discovery Tool Virtual
- CALs / Identified Manually
- Active Software Assurance Requirement
- Deployment Notes
- Total Software Deployed
- License Position before Downgrades
- Downgraded (-) or Downgrades Applied (+)
- Delta
- Comments
- Software Assurance Delta
- Unused Upgrade License
- Unused Upgrades (w/Maintenance)

Microsoft EA Reports

Microsoft EA reports allow you to display, collate and sort data relating to your organization's true-ups. Access the reports using the links in the navigation menu:



True Up Requirements

The True Up Requirements report displays a list of True-up orders for your organization.

Columns

- Business Unit
- Manufacturer
- Agreement Name
- Agreement Number
- Enrolment Number
- Owner
- License

- Part Number
- Country of Use
- Quantity
- Cost Per License
- Total Cost
- Environment

Audit Partner Reports

Audit partner reports allow you to display, collate and sort data from across the License Manager database. These reports are often requested by an auditor to determine your compliance position. Access the reports using the links in the navigation menu:



Audit Partner - ELP - SAM Services - Microsoft

The Audit Partner - ELP - SAM Services - Microsoft report shows the SAM Services across the organization.

Columns

- Product Family
- Version
- MLS Volume Licenses at Start Date
- FPP/OEM
- Licenses Purchased After Review Started
- Preliminary License Entitlement
- Tool Data
- Manual
- Total

- Software Deployment vs License Entitlement
- License Allocation (+/-) Upgrades Downgrades etc
- End License Position
- Comments

Audit Partner - ELP Detailed - Microsoft

The Audit Partner - ELP Detailed - Microsoft Report shows the Effective License Position: the number of licenses the organization owns and how this compares with actual usage. It provides the complete Actual License Position information Microsoft require.

Columns

- Product Family
- Version
- Non-conforming
- Product Name
- Non-EA Volume Licenses
- Active EA
- Old EA
- Contracts
- MLS Volume Licenses
- FPP Licenses
- MLP Licenses
- FPP Upgrades
- OEM Licenses
- Preliminary License Entitlement
- Identified by Inventory Discovered Tool
- Identified Manually
- Total Software Deployment
- Software Deployment vs License Entitlement
- License Allocation (+/-) Upgrades Downgrades etc
- Licensing Delta
- Comments
- Upgrade License Quantity
- Upgrade License Quantity (w/Maintenance)
- Notes

Audit Partner - ELP Detailed - All Manufacturers

The Audit Partner - ELP Detailed - All Manufacturers report shows the Effective License Position for all manufacturers.

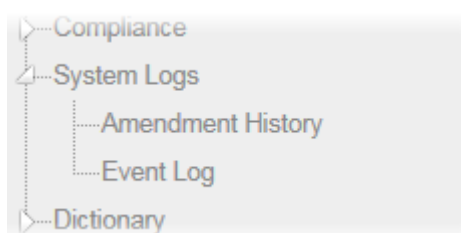
Columns

- Manufacturer
- Product Family

- Version
- Non-Conforming
- Product Name
- Non-EA Volume License
- Active EA
- Old EA
- Contracts
- MLS Volume Licenses
- FPP Licenses
- MLP Licenses
- FPP Upgrades
- OEM Licenses
- Preliminary License Entitlement
- Identified by Inventory Discovered Tool
- Identified Manually
- Total Software Deployment
- Software Deployment vs License Entitlement
- License Allocation (+/-) Upgrades Downgrades etc
- Licensing Delta
- Comments
- Upgrade License Quantity
- Upgrade License Quantity (w/Maintenance)
- Notes

System Logs Reports

The system logs reports section contains technical reports about the License Manager application. Access the reports using the links in the navigation menu:



System Logs - Amendment History

The System Logs - Amendment History report shows events (user activity) in the License Records workspace and the Contract Records workspace. Use this report to find out which items were added and removed to either workspace, who made the changes and when the changes were made.

Columns

- Event ID

- User
- Date Changed
- Action
- Item Type
- Description
- Item ID
- Item Name
- Manufacturer
- Product
- Quantity
- OU Name
- Version
- Action Type

System Logs - Event Log

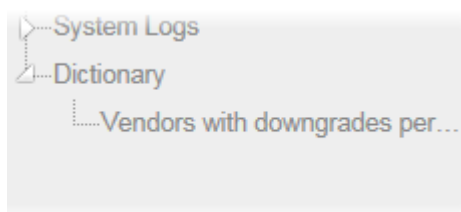
The System Logs - Event Log Report shows events (user actions) in License Manager. Use this report to track every event, from database changes to technical details such as when the application was opened and closed.

Columns

- Event ID
- User
- Date Changed
- Action
- Item Type
- Description
- Item ID
- Item Name
- Manufacturer
- Product
- Quantity
- OU Name
- Version
- Action Type

Dictionary

Dictionary reports allow you to display, collate and sort data relating to the dictionaries workspace of License Manager. Access the reports using the links in the navigation menu:



Dictionary - Vendors with downgrades permitted

The Dictionary - Vendors with downgrades permitted report shows all vendors in that permit downgrades to be applied to base licenses.

Columns

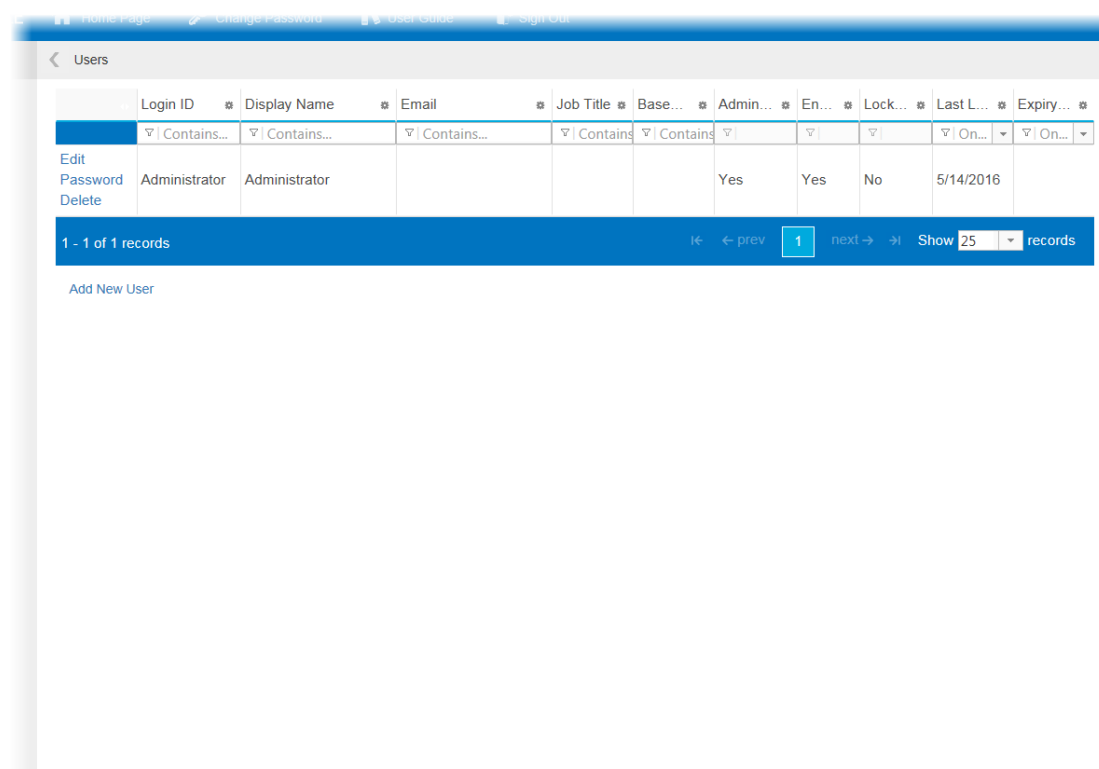
- Manufacturer
- URL
- Downgrade Steps

ADMINISTRATION

The Administration workspace is used to configure the Cloud Console. Only users with administrator permissions can access the administration workspace.

Cloud Console should be configured to meet the needs of your organization. This is based on how your License Manager database has been configured, and how the responsibilities for license management are organized within your organization.

Click **Administration** in the navigation menu to access the administration workspace.



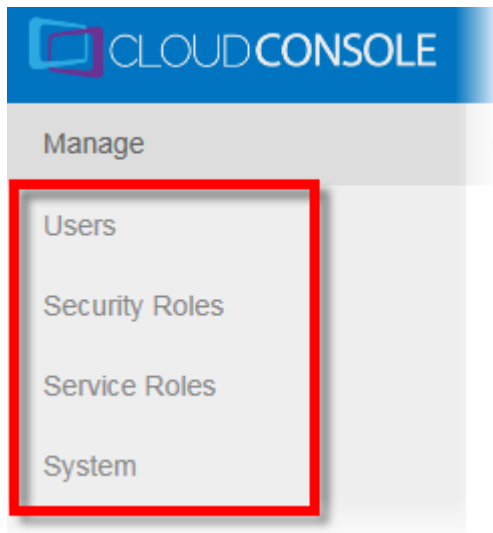
The screenshot shows the 'Users' management interface. At the top, there are navigation links: Home Page, Change Password, User Guide, and Sign Out. Below the navigation bar is a header for the 'Users' section. The main area contains a table with columns: Login ID, Display Name, Email, Job Title, Base..., Admin..., En..., Lock..., Last L..., and Expiry... Each column has a search icon and a 'Contains...' filter. The first row of data shows a user named 'Administrator' with a 'Yes' status in the 'Admin...' column and a '5/14/2016' expiry date. To the left of the table are links for 'Edit', 'Password', and 'Delete'. Below the table is a pagination bar showing '1 - 1 of 1 records' and a 'Show 25 records' dropdown. At the bottom left, there is a link to 'Add New User'.

	Login ID	Display Name	Email	Job Title	Base...	Admin...	En...	Lock...	Last L...	Expiry...
Edit Password Delete	Administrator	Administrator				Yes	Yes	No	5/14/2016	

1 - 1 of 1 records ← prev 1 next → Show 25 records

[Add New User](#)

There are up to four pages which are used to administrate Cloud Console. These are accessed from the navigation menu:



- The [Users page](#) is used to manage all the user accounts for your organization
- The [Security Roles page](#) is used to define the security roles for user accounts. Security roles allow you to restrict access to data by business unit. For example; you may have a business unit for each country you operate in. You could create security roles for each country so when a user views the data, they are only shown the data for the country they operate in. *Please note: this page is only available if business unit security is activated in the system page*
- The [Service Roles page](#) is used to define the service roles for user accounts. Service roles allow you to create custom filters for users to apply when viewing reports. For example; you may have a group of users who are responsible for managing database licensing. You can create a service role which will provide a series of filters to facilitate this role. *Please note: this page is only available if service management is activated in the system page*
- The [System page](#) is used to configure the operational features of Cloud Console

Click on a **Page** to view it in the workspace.

Users

Users require a user account to access Cloud Console. This allows them to view licensing data appropriate to their role.

A user account grants access to the notifications, charts and reports workspaces. User accounts can also be given administrator rights to allow the user to access the administration workspace.

There are several features to a user account:

- A user account is locked when the user enters an incorrect password more than 4 times in a row
- A locked user account must be unlocked and the password must be reset by a system administrator
- A user account can be given an expiry date which will disable the account after a specific date
- A disabled user account must be re-enabled by a system administrator
- A user account can be assigned service roles to provide custom filters for use in the reports workspace
- A user account can be assigned security roles to restrict access to data by business unit

Users are managed in the users page.

1. Click **Administration** in the navigation menu. The administration workspace is displayed
2. Click **Users** in the navigation menu. The users page is displayed:

The screenshot shows the 'Users' page in the Cloud Console. The left sidebar contains a 'Manage' section with 'Users' selected. The main area displays a table of users. The table has columns for Login ID, Display Name, Email, Job Title, Base..., Admin..., En..., Lock..., Last L..., and Expiry... The first user is 'Administrator' with a last login of '5/18/2016'. The second user is 'Mathew' with an expiry date of '6/30/2016'. The third user is 'Claire' with an expiry date of '6/30/2016'. Below the table, there is a pagination bar showing '1 - 3 of 3 records' and a 'Show 25 records' button.

The users page allows you to:

- Create new users
- Edit a user
- Change the password for a user
- Delete a user

Note: An administrator account is automatically created when the system is installed. Do not delete this account

How to create a user

Use the users page to create new user accounts

1. Click **Add New User**. The add new user page is displayed:

The screenshot shows the 'Add New User' page. At the top, there is a navigation bar with links: Home Page, Change Password, User Guide, and Sign Out. Below this is a header with a back arrow and the text 'Add New User'. The main form is titled 'User Information' and contains the following fields and options:

- Display Name**: Text input field.
- Login ID**: Text input field.
- Email**: Text input field.
- Job Title**: Text input field.
- Base Department**: Text input field.
- Telephone**: Text input field.
- Administrator**: Checkbox.
- Enabled**: Checkbox.
- Locked Out**: Checkbox.
- Expiry Date**: Dropdown menu with 'Expiry Date' selected.
- Service Roles**:
 - ☐ Database Licensing Management
 - ☐ MS Office Administrator
- Security Roles**:
 - ☐ Div 1 License Management
- Password**: Password input field with masked characters (dots).

2. Type the **Display Name**
3. Type the **Login ID**
4. Type the **Email** address
5. Type the **Job Title**
6. Type the **Base Department**. This is used to identify the department where the user works
7. Type the **Telephone** number
8. Tick **Administrator** to give the user administrator permissions
9. Tick **Enabled** to enable the account
10. Select an **Expiry Date** to disable the account after a specific date
11. Select a **Security Role** to restrict the data a user can access
12. Select a **Service Role** to give the user additional filters to use in the reports workspace
13. Type a **Password** for the user account
14. Type the same password in the **Confirm Password** field
15. Click **Save**. The user is added

How to edit a user

Use the users page to edit a user account

1. Click **Edit** on the user account you want to edit. The edit user page is displayed:

The screenshot shows the 'Edit User' page with the following fields and values:

- Display Name:** Mathew
- Login ID:** Mathew
- Email:** mathew@red-robot.net
- Job Title:** Database Licensing
- Base Department:** IT
- Telephone:** 0
- Administrator:** ☐
- Enabled:** ☒
- Locked Out:** ☒
- Expiry Date:** 30/06/2016
- Last Login:** 5/18/2016 10:04:17 PM
- Service Roles:**
 - ☒ Database Licensing Management
 - ☐ MS Office Administrator
- Security Roles:**
 - ☐ Div 1 License Management
 - ☐ Div 2 License Management

2. Edit the account as required. You can edit the following fields:
 - Type the **Display Name**
 - Type the **Login ID**
 - Type the **Email** address
 - Type the **Job Title**
 - Type the **Base Department**. This is used to identify the department where the user works
 - Type the **Telephone** number
 - Tick **Administrator** to give the user administrator permissions
 - Tick **Enabled** to enable the account
 - Select an **Expiry Date** to disable the account after a specific date
 - Select a **Security Role** to restrict the data a user can access
 - Select a **Service Role** to give the user additional filters to use in the reports workspace
 - Type a **Password** for the user account
 - Type the same password in the **Confirm Password** field
3. Click **Save**

How to change the password for a user

Use the users page to change the password for a user account

1. Click **Password** on the user account you want to change. The change password page is displayed:

2. Type the **New Password** for your account
3. Type the same password in the **Confirm New Password** field
4. Click **Update**. The new password is saved

How to edit a user

Use the users page to delete a user account

1. Click **Delete** on the user account you want to delete. The delete user page is displayed:

Display Name	Claire
Login ID	Claire
Email	claire@red-robot.net
Job Title	Database Licensing
Base Department	IT
Telephone	0
Administrator	<input type="checkbox"/>
Enabled	<input checked="" type="checkbox"/>
Locked Out	<input checked="" type="checkbox"/>
Last Login	
Expiry Date	30/06/2016

2. Click **Delete**

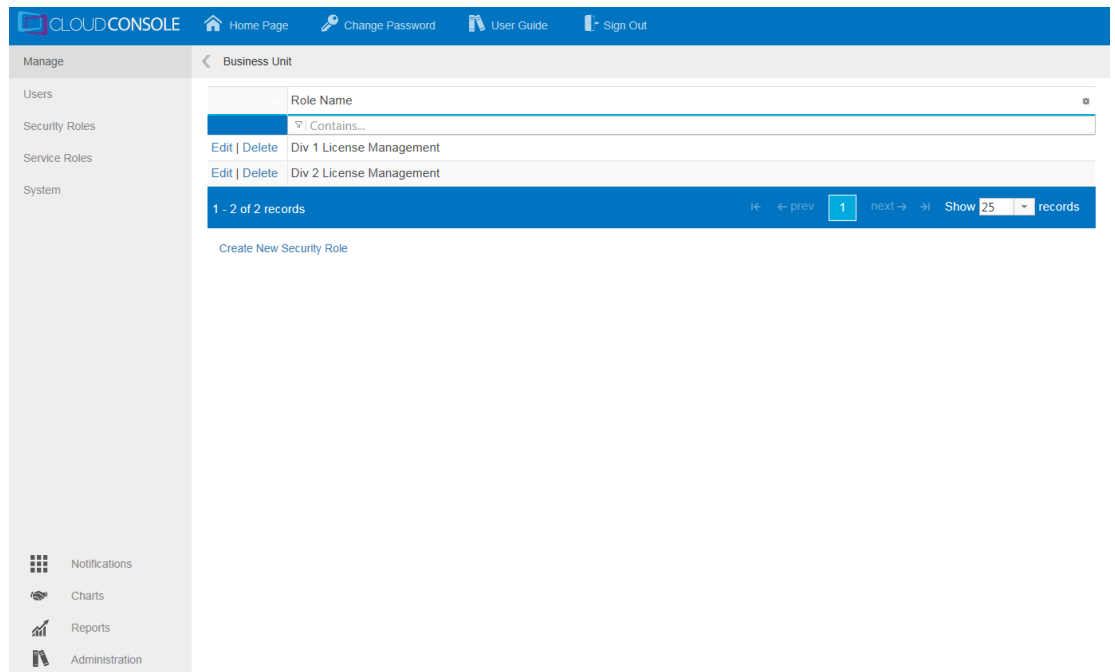
Security Roles

The service roles page allows you to create service roles to assign to [Users](#).

Security roles allow you to restrict the information users can view. The information can be restricted by business unit.

Security roles are managed in the service management page.

1. Click **Administration** in the navigation menu. The administration workspace is displayed
2. Click **Security Roles** in the navigation menu. The business unit page is displayed:



The business unit page allows you to:

- Create new security roles
- Edit a security role
- Delete a security role

Note: The security roles page is only available if business unit security is enabled in the system settings. Use the [System page](#) to activate business unit security.

How to create a security role

Use the roles table to create security roles.

1. Click **Create New Security Role**. The create new security role page is displayed:

2. Type the **Role Name**
3. Click **Save**. The role is added and the business unit rules tree is displayed:

4. Set the business unit security rules for the role:
 - Tick a business unit and click **Allow** to allow access to data related to the selected business units. Click **Save** to save the changes
 - Tick a business unit and click **Deny** to deny access to data related to the selected business units. Click **Save** to save the changes
 - Click **Unset** to remove the current rules
5. Click **Back** to return to the security roles page

How to edit a security role

Use the roles table to edit a security role.

1. Click **Edit** on the security role you want to edit. The security role update page is displayed:

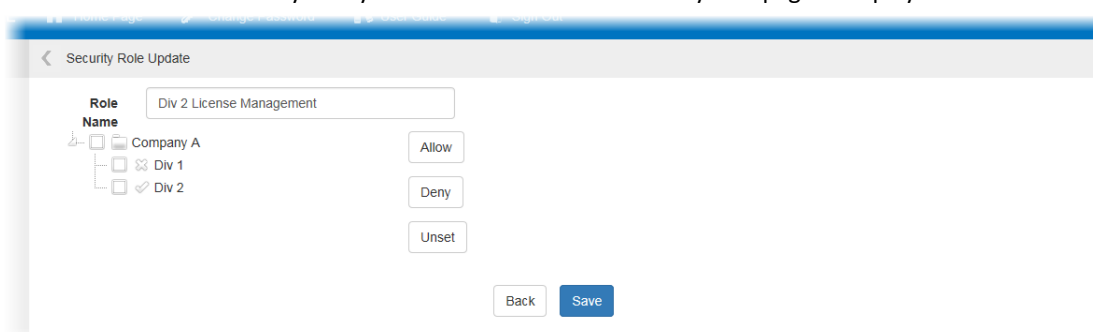
2. Edit the filter set as required. You can edit the following fields:

- Type the **Role Name**
- Set the business unit security rules for the role:
 - Tick a business unit and click **Allow** to allow access to data related to the selected business units. Click **Save** to save the changes
 - Tick a business unit and click **Deny** to deny access to data related to the selected business units. Click **Save** to save the changes
 - Click **Unset** to remove the current rules
- 3. Click **Back** to return to the security roles page

How to delete a security role

Use the roles table to edit a security role.

1. Click **Delete** on the security role you want to delete. The security role page is displayed:



2. Click **Delete**

Service Roles

The service roles page allows you to create service roles to assign to [Users](#).

Service roles are groups of custom filters for users to use in the reports workspace. The filters can be designed to meet specific needs. For example; you may have a group of users who are responsible for managing database licensing. You could create a service role for database licensing. This could include filters which will only show data related to the licensing for database products.

There are several features to a service role:

- A service role consists of any number of filter sets
- Filter sets contain multiple filters which are combined. This allows users to apply a complex filter query to data in the reports workspace to view the data appropriate to their needs
- Filter sets can be assigned to multiple service roles. This allows you to create multiple service roles for different access requirements. For example; you may have a team which manages database licensing. The manager may be responsible for every type of database licensing, where individual members of the team may only be responsible for one database type. You can create filter sets to show licensing data related to each type of database. Each set can be assigned to separate role for the individual members of the team to use. You can then create a manager role to which includes every filter set for the manager to use

Service roles and filter sets are managed in the service management page.

1. Click **Administration** in the navigation menu. The administration workspace is displayed
2. Click Service Roles in the navigation menu. The service management page is displayed:

The service management page is split into two tables:

- Filters. This allows you to:
 - Add new filter sets
 - Edit a filter set
 - Delete a filter set
- Service roles. This allows you to:
 - Add new service management roles
 - Edit a service management role
 - Delete a service management role

Note: The service management page is only available if service management is enabled in the system settings. Use the [System page](#) to activate service management.

How to create a filter set

The service management page is split into two tables. Use the filters table to create filter sets.

1. Click **Add New Filter**. The add filter set page is displayed:

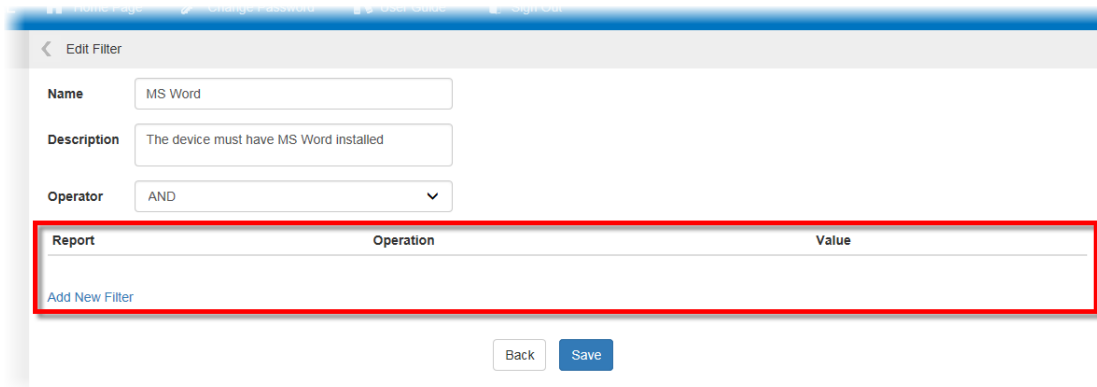
2. Type the **Name** of the filter set
3. Type a **Description** of the filter set
4. Click **Save**. The filter is added and the filter table is displayed:

Use the filter table to create every filter required for the filter set

5. Click **Add New Filter**. The new filter page is displayed:

6. Type the **Name** for the filter
7. Type a **Description** for the filter
8. Select an **Operator** for the filter. This defines how the criteria lines operate in relation to each other. There are two options:
 - Select **AND** to require that all the criteria must be met by the data to be included
 - Select **OR** to allow data to be included if any of the criteria is be met

11. Click **Save**. The filter criteria table is displayed:



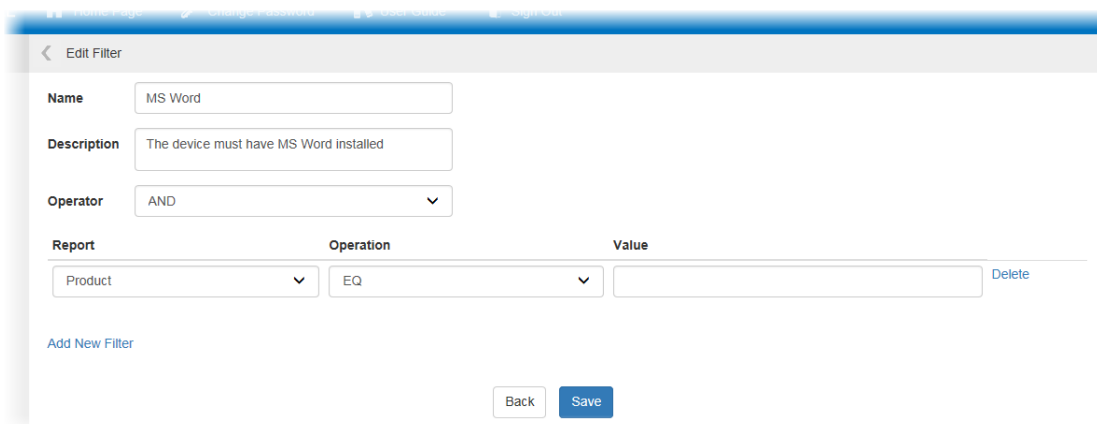
The screenshot shows the 'Edit Filter' form with the following fields:

- Name:** MS Word
- Description:** The device must have MS Word installed
- Operator:** AND

Below these fields is a table with three columns: **Report**, **Operation**, and **Value**. The table is currently empty, and a red box highlights the table area. Below the table is a link labeled [Add New Filter](#). At the bottom of the form are **Back** and **Save** buttons.

Use the filter criteria table to define what criteria must be met to allow data to be displayed when the filter set is run.

12. Click **Add New Filter**. A line is added to the table:



The screenshot shows the 'Edit Filter' form with the same fields as before. The filter criteria table now has one row:

Report	Operation	Value	
Product	EQ		Delete

Below the table is a link labeled [Add New Filter](#). At the bottom of the form are **Back** and **Save** buttons.

Input the criteria for the line:

- Select the **Report** type. There are four options:
 - Product
 - Manufacturer
 - Environment
 - Country
- Select the **Operation**. This defines how the value must relate to the report in order to meet the criteria. There are 12 options:
 - EQ. The report must equal the value. For example; Product is Excel
 - NE. The report must not equal the value. For example; Manufacturer is not Adobe
 - GT. The report must be greater than the value. For example; Product is greater than 2010
 - LT. The report must be less than the value. For example; Product is less than 2013
 - GE. The report must be greater than or equal the value. For example; Product is greater than or equal to 2010
 - LE. The report must be less than or equal to the value. For example; Product is less than or equal to 2013
 - Contains. The report must contain the value. For example; Country must contain united
 - StartsWith. The report must start with the value. For example; Environment must start with virt
 - EndsWith. The report must end with the value. For example; Manufacturer must end with inc
 - NotContains. The report must not contain the value. For example; Country must not contain united
 - NotStartsWith. The report must not start with the value. For example; Environment must not start with virt
 - NotEndsWith. The report must not end with the value. For example; Manufacturer must not end with inc
- Type the **Value**

Repeat this step to create all of the criteria for the filter

13. Click **Save**. The filter is added to the set and the edit filter set page is displayed again. Repeat steps 7 to 12 to create all of the filters for the set. *Please note; each filter will return data independently of the other filters in the set when the filter is applied to a report*
14. Click **Save**. The filter set is saved

How to edit filter sets

The service management page is split into two tables. Use the filters table to edit filter sets.

1. Click **Edit** on the filter set you want to edit. The edit filter set page is displayed:

Edit Filter Set

Name Database Management (Oracle)

Description Shows Oracle based database products

Group	Criteria
Oracle	[Manufacturer] EQ Oracle

1 - 1 of 1 records | Show 25 records

[Add New Filter](#)

[Back](#) [Save](#)

2. Edit the filter set as required. You can edit the following fields:

- Type the **Name** of the filter set
- Type a **Description** of the filter set
- Click **Add New Filter** to add a new filter to the filter set
- Click **Edit** on a filter in the table to edit it
- Click **Delete** on a filter in the table to delete it

[See How to create a filter set for further guidance](#)

3. Click **Save**

How to delete a filter set

The service management page is split into two tables. Use the filters table to edit filter sets.

1. Click **Delete** on the filter set you want to delete. The delete filter set page is displayed:

Delete Filter Set

Name Marketing Software Licensing

Description This provides quick access to licensing details for products used by the marketing team

Group	Criteria
-------	----------

0 - 0 of 0 records | Show 25 records

[Back](#) [Delete](#)

2. Click **Delete**

How to create a service role

The service management page is split into two tables. Use the service roles table to add the service roles.

1. Click **Add New Service Management Role**. The add new service management role page is displayed:

Add New Service Management Role

Role Name

Back Save

2. Type the **Role Name**
3. Click **Save**. The filter sets table is displayed:

Service Management Edit

Role Name MS Office Administrator

Select	Name	Description
<input type="checkbox"/>	Database Management (Oracle)	Shows Oracle based database products
<input type="checkbox"/>	Database Management (MS)	Shows Microsoft Database related products
<input type="checkbox"/>	MS Office Products	Filter showing product data for MS Office

Back Save

4. Tick the filter sets you want to make available to users with the service role
5. Click **Save**

How to edit a service role

The service management page is split into two tables. Use the service roles table to edit a service role.

1. Click **Edit** on the service role you want to edit. The service management edit page is displayed:

Service Management Edit

Role Name Database Licensing Management

Select	Name	Description
<input checked="" type="checkbox"/>	Database Management (Oracle)	Shows Oracle based database products
<input checked="" type="checkbox"/>	Database Management (MS)	Shows Microsoft Database related products
<input type="checkbox"/>	MS Office Products	Filter showing product data for MS Office

Back Save

2. Edit the service role as required. You can edit the following fields:
 - Type the **Role Name**
 - Tick the filter sets you want to make available to users with the service role
3. Click **Save**

How to delete a service role

The service management page is split into two tables. Use the service roles table to delete a service role.

1. Click **Delete** on the service role you want to delete. The delete role page is displayed:

Service Management Edit

Role Name: Database Licensing Management

Select	Name	Description
<input checked="" type="checkbox"/>	Database Management (Oracle)	Shows Oracle based database products
<input checked="" type="checkbox"/>	Database Mangement (MS)	Shows Microsoft Database related products
<input type="checkbox"/>	MS Office Products	Filter showing product data for MS Office

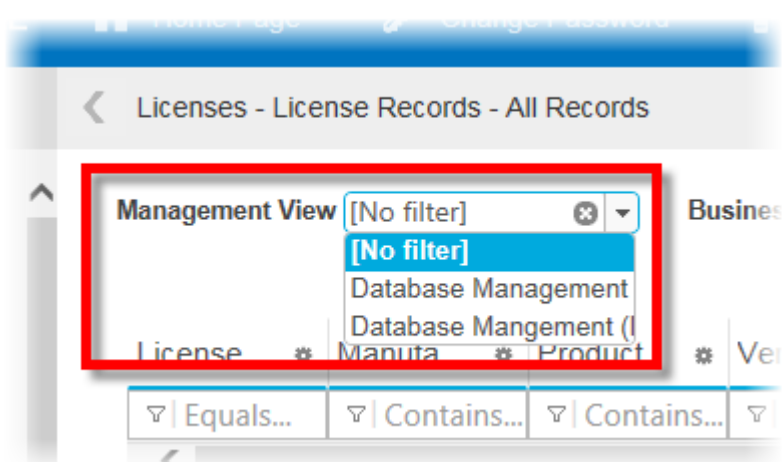
Back Save

2. Click **Delete**

How to use service roles

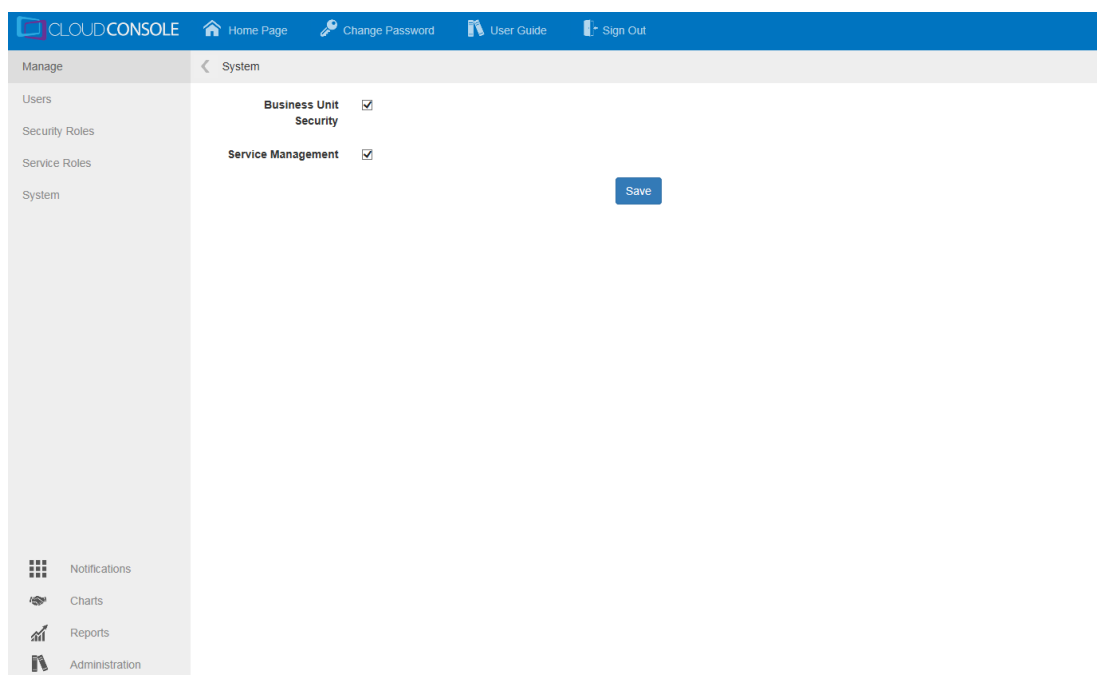
Service roles are assigned to user accounts in the [Users page](#). A user who is assigned a service role has access to its filter sets.

Filter sets are applied to data in the reports workspace:



System

The system page allows you to define the system settings for your organization.



There are two system settings:

- **Business Unit Security** is used to restrict user access to data by business unit. Security roles are created to define different levels of access. When added to a user account, a security role restricts the data the user can view in Cloud Console. For example; a user may be responsible for managing the licensing for their office only. Their office would be represented as a business unit in License Manager. A security role can be created to only show licensing data related to their business unit
- **Service Management** is used to create custom filters for users to use. Service roles are created to group the appropriate filters together appropriate to the users needs. When a security role is added to a user account, its filters are made available in the reports workspace for the user to apply to the data

How to edit the system settings

1. Select the system settings. There are two options:
 - Tick **Business Unit Security** to enable the security roles page. Disable this option if all users should be shown the data for the entire organization
 - Tick **Service Management** to enable the service roles page. Disable this option if you do not wish to provide custom filters for users
2. Click **Update** to save the new settings

Support

Support website: www.licensedashboard.com

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Telephone US/Canada: 1-855-773-3404

Email: support@licensedashboard.com

Address: License Dashboard Limited, Blenheim House, York Road, Pocklington, York YO42 1NS

Online resources

- Share your thoughts and views in the [License Dashboard Forum](http://www.licensedashboard.com/forums/). Get the latest news, development schedules and technical details. Share your wish lists and questions, and communicate with other users.

<http://www.licensedashboard.com/forums/>

- [Download](#) the latest patch versions of the software, including the latest dictionary definition updates. You can log in using your forum username and password.

<http://www.licensedashboard.com/LatestDownloads/Login.aspx>