LICENSE DASHBOARD™
Designed and built by SAM professionals for SAM professionals

Getting Started With License Manager 10.3

User Guide

WELCOME TO LICENSE MANAGER

License Manager is the market's leading software license management tool. It facilitates and drives more SAM programs than any other application on today's market.

With its easy-to-use interface and built-in license intelligence, you can now manage the full lifecycle of your software. This includes maintaining comprehensive license and software usage inventories, and having the ability to verify your organization's compliance status at any time. These tasks can be carried out with limited licensing knowledge.

Either as a new or existing user of License Manager, you will quickly recognize the significant benefits that can be achieved by using this unique product. From reducing software spend to eliminating illegal exposure, License Manager is an essential component that every organization will need when controlling its compliance status.

License Dashboard Limited is a trading subsidiary of the Blenheim Group.

p: License Dashboard Limited, Blenheim House, York Road, Pocklington, York, YO42 1NS - UK

t: +44 845 265 1217 (UK/International)

t: 1-855-773-3404 (US & Canada)

f: +44 845 265 1219

e: info@licensedashboard.com

License Dashboard Limited is a company registered in England and Wales, with company number 06599902 and VAT number GB 755 3490 15

Purpose and Scope

This help documentation is designed to get you up and running with License Manager as quickly as possible. The beginning section provides installation details. The second section describes basic application features and the user interface. The final section includes tips, further reading and support information.

More detailed help and support is available in the License Manager User Guide.

Table of Contents

INSTALLING LICENSE MANAGER

Before you install License Manager, check that you meet or exceed the following software and hardware requirements.

Server requirements

Software

- Microsoft SQL Server or Express 2008/2008 R2/2012
- x86 or x64 supported

Hardware

- Physical or virtual server
- A specification suitable for running SQL Server 2008/2008 R2/2012 (See Microsoft best practice guides)
- Database size depends on the number of devices to be imported into Data Cleanse
    - No more than 250 MB with no device data
    - About 250 MB of device data per 1,000 devices for .EXE file data.
    - About 250 MB of device data per 100 devices for metering data.

Client requirements

Software

- Microsoft .NET Framework v4.0 (Client Profile)
- Any of the following operating systems
    - Microsoft Windows XP (SP2 or later)
    - Windows Vista
    - Windows 7
    - Windows 8
    - Windows Server 2003 (SP1 or later)
    - Windows Server 2008
    - Windows Server 2008 R2
        - x86 and x64 supported
    - Windows Server 2012
- Microsoft Office 2007 or higher is needed if you intend to import a Microsoft License Statement (MLS)

Hardware

- Physical or virtual
- A specification suitable for running the operating system and general applications
- Up to 20 MB of disk space for the client application

Beginning the Installation

When you purchase License Manager, your reseller will provide you with a license key. You will also be provided with a web link to a .ZIP archive file. This file contains the License Manager application.

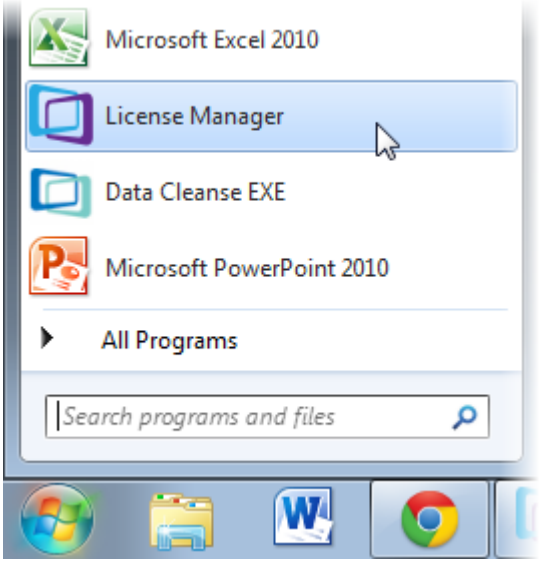
Download the .ZIP archive, then extract the contents to a suitable location.

Open the **License Manager Installer v5.x** folder. Then double-click the **LicenseManagerSetup.msi** file to begin the installation. If you experience any problems with the installation, please refer to the **License Manager 5.x Installation Guide**. A PDF copy is included in the .ZIP archive.

Once the License Manager installation has finished, there are three important steps that must be completed. When you open License Manager for the first time, it will automatically take you through the first two steps.

1. Connect to the SQL Server
2. Configure your license with the Update License Task
3. Add a Dictionary

To begin, open License Manager from the Windows Start menu.



Please refer to the Choosing Application Settings topic when you have finished installing License Manager.

If you have used License Manager before, you may wish to read the topics Backing Up a Database and Restoring a Database Backup before proceeding with the installation.

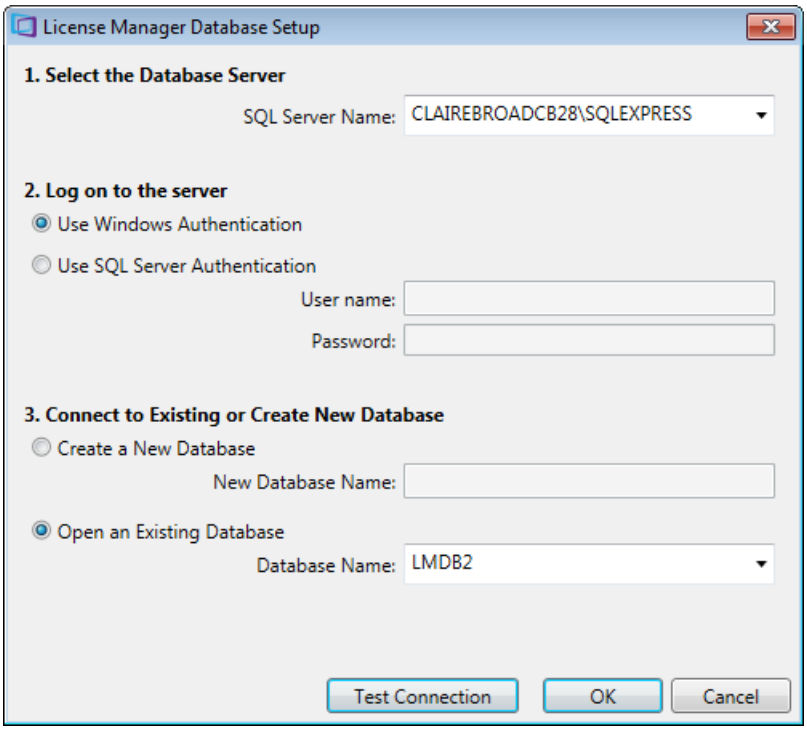
License Manager Database Setup

License Manager requires a connection to a SQL Server Database.

The License Manager Database Setup window is displayed when you open License Manager. This guides you through the process of connecting to a SQL Server Database. License Manager can connect to an existing database or create a new one.

How to connect to SQL server

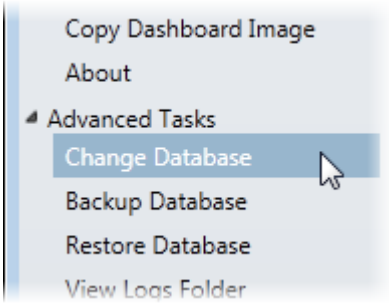
License Manager can connect to Microsoft SQL Server 2008 or later, whether installed on your local computer or on a remote server. To connect to a SQL Server, you will need to know the name of the computer it is running on. You will also need to know the name of the **instance** it is installed as. Your IT support department should be able to provide you with these details if necessary.



1. Type in the **SQL Server Name**. The correct format is **SQL-SERVER-COMPUTER-NAME\INSTANCE-NAME**.
2. Select the authentication type that will be used to log on to the SQL Server.
3. If you have an existing License Manager database, select **Open an Existing Database** and select it from the drop-down list. If you do not, select **Create a New Database** and type in a name for the new database.
4. Click the **Test Connection** button to verify the entered details are correct. If successful, a Connection Succeeded message will be displayed. If there is a problem, an error message will appear. Click **OK** to close the message.
5. Click **OK** to close the License Manager Database Setup screen.

How to change your SQL Server Database Connection

If you need to change the SQL Server database you are connected to, you can use the Change Database task in the Dashboards workspace.



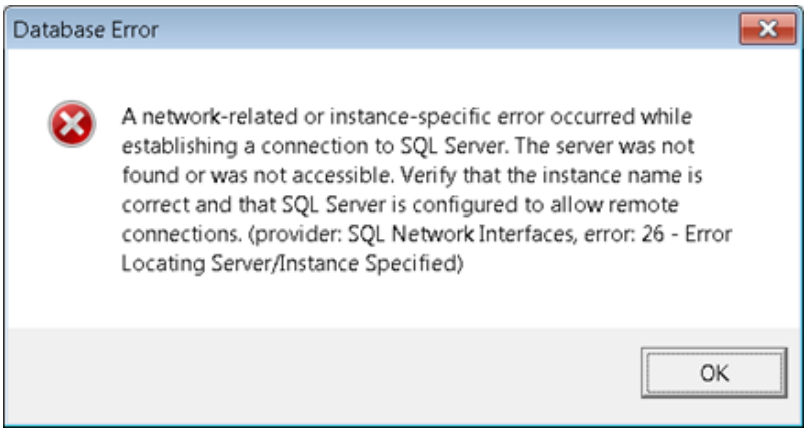
Clicking the Change Database task opens the License Manager Database Setup dialog populated with the current settings.

Troubleshooting SQL Server Connection errors

If you experience problems connecting License Manager to SQL Server, it is recommended that you contact your local IT support department or person responsible for managing the SQL Server.

Common errors

1. Error message displayed when clicking the database name drop down list:



This is a generic error message stating that the SQL Server specified cannot be contacted. Verify that the SQL Server computer name and SQL Server instance name are entered correctly. This error will also be displayed if:

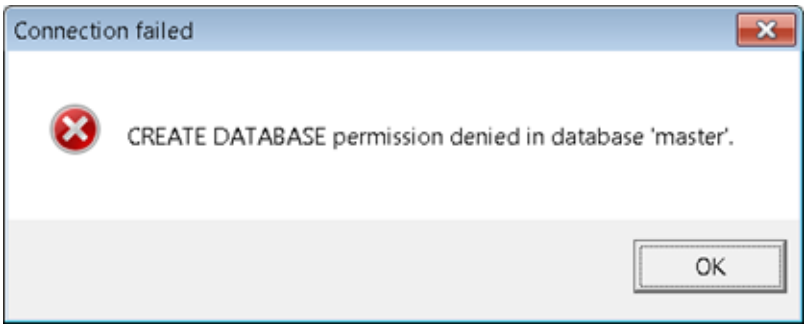
- The SQL Server is not configured to use TCP/IP, or
- The SQL Server Browser service is not started on the SQL Server computer that is using an instance name of anything other than MSSQLSERVER.

2. Database Name drop down list is empty.

The Database Name drop down list will only show License Manager databases on the specified SQL Server. If the drop down is empty:

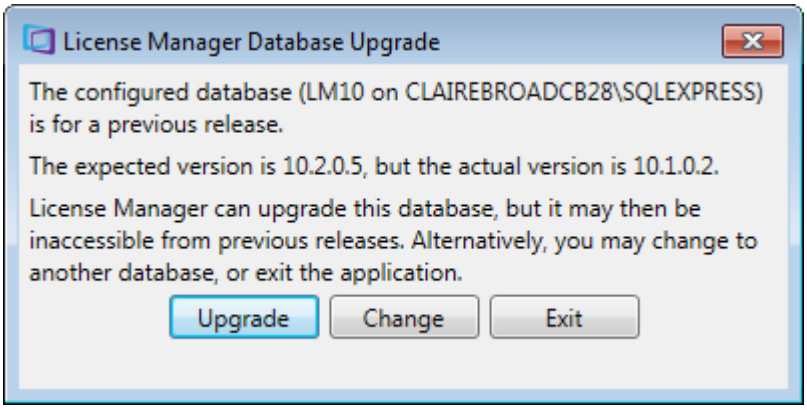
- There are no License Manager databases on the SQL Server, or
- Your user account has not been granted access to the database.

3. Error message displayed when trying to create a new License Manager database:



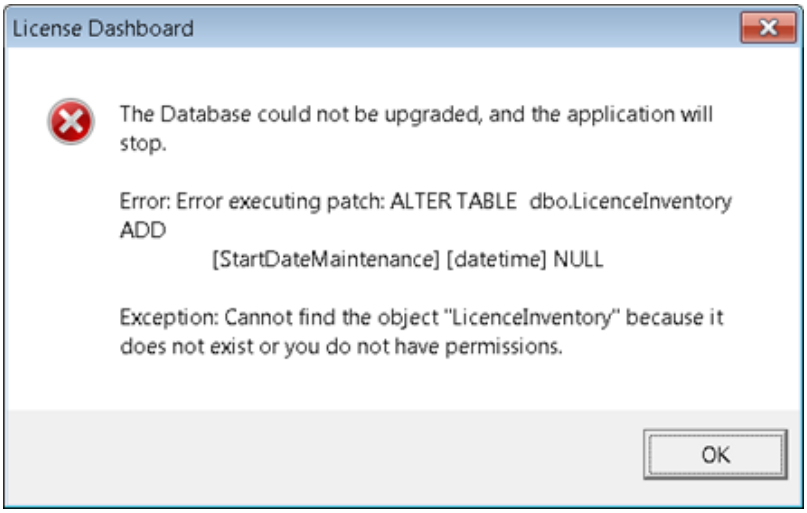
This error is displayed if your user account does not have permission to create a new database on the SQL Server. To create a new database, the user needs the **dbcreator** or **sysadmin** server roles.

4. Error message displayed when connecting to a database that was created in an older version of License Manager:



- Select **Upgrade** to upgrade the database to match your version of License Manager. Note: this is not reversible. Older versions of License Manager will not be able to connect to the upgraded database. It is recommended that you backup the database before upgrading it.
- Select **Change** to go back to the License Manager Database Setup screen.
- Select **Exit** to close License Manager without making any changes.

5. Error message displayed when attempting to upgrade a License Manager database (the message may vary):

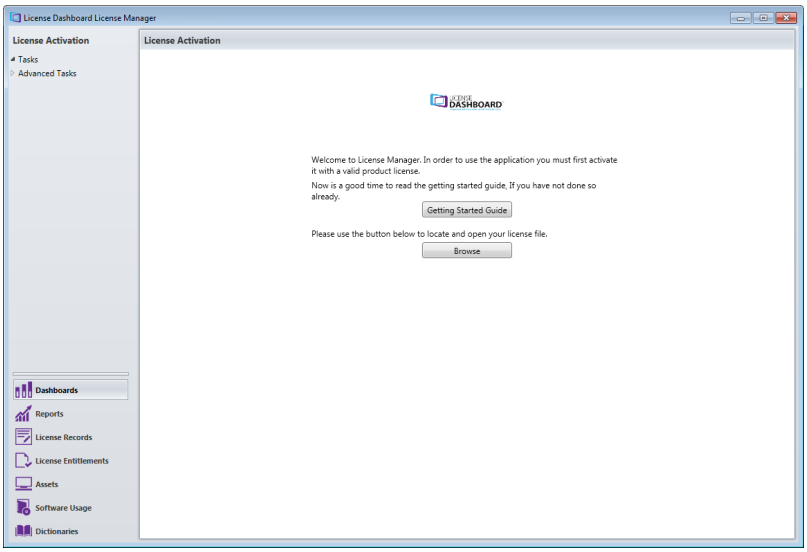


This error indicates that the user does not have the SQL Server permissions to upgrade the License Manager database. The user needs **dbo** rights to the License Manager database to upgrade it.

Configuring Your License Key

Every License Manager database needs a **.lic** license key file to run. This will be supplied to you by your reseller.

The license key file must be installed within the database. It is installed using the Update License task. This task will start automatically when you access an unlicensed License Manager database for the first time.

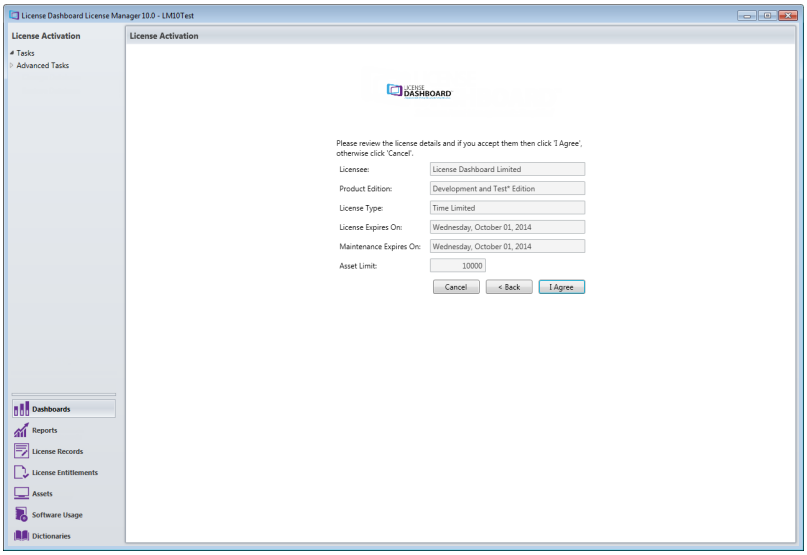


There are two Advanced Tasks available in the advanced tasks list. These can be performed before you install your license key:

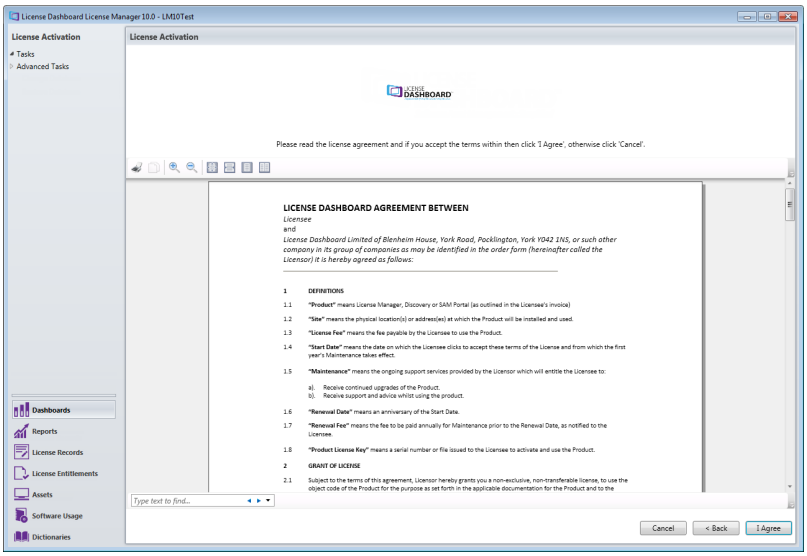
- Change Database. Use this task to connect License Manager to a different database. See License Manager Database Setup for guidance.
- Restore Database. Use this if you have backed up a database before upgrading License Manager. See Restoring a Local Database for guidance.

How to apply your .lic file

1. Click **Browse** and navigate to the folder containing your .lic file. Select it and click **Open**.
2. The license details will be displayed. Review the details. If they are correct, click **I Agree**.



3. The next page will display the End User License Agreement. Review the agreement. Click **I Agree** if you accept the terms.



4. The License key has now been installed. Click **Close** and the Dashboards workspace is displayed.

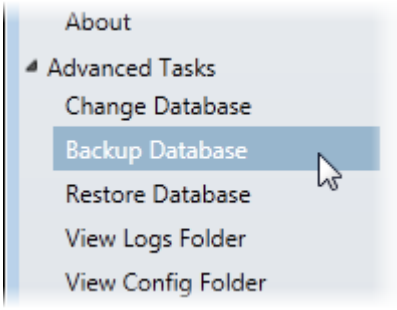
Backing Up a Local Database

If License Manager is connecting to a SQL Server instance on the local computer, use the License Manager **Backup Database** task to backup your License Manager database.

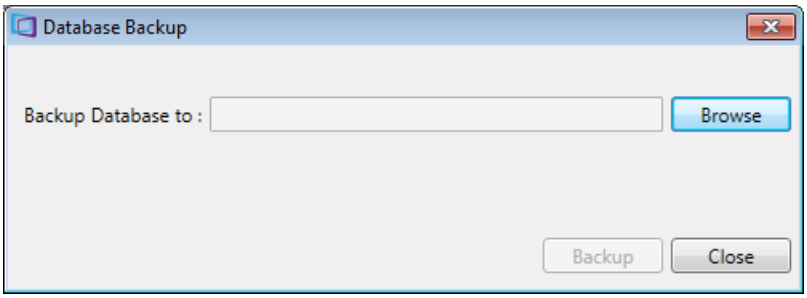
If License Manager is using a SQL Server instance on a remote computer, the **Backup Database** task is not available within License Manager. In this case, use the SQL Server facilities to backup the License Manager database.

How to back up a local database

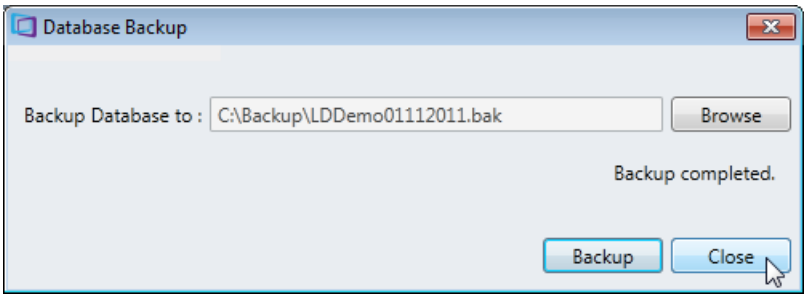
1. Click **Dashboards** in the workspace navigation pane. The Dashboards workspace opens.
2. Click **Backup Database** in the Advanced Tasks List.



3. In the dialog box, click the **Browse** button to choose a location for your backup file. Then click the **Backup** button.



4. Click the **Close** button when the backup is complete.



Restoring a Local Database

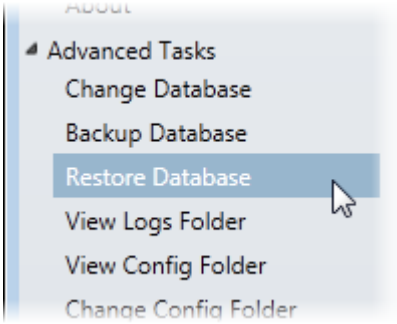
If License Manager is connecting to a SQL Server instance on the local computer, use the License Manager **Restore Database** task to restore a License Manager database.

If License Manager is using a SQL Server instance on remote computer, the **Restore Database** task is not available within License Manager. In this case, use the SQL Server facilities to restore a License Manager database.

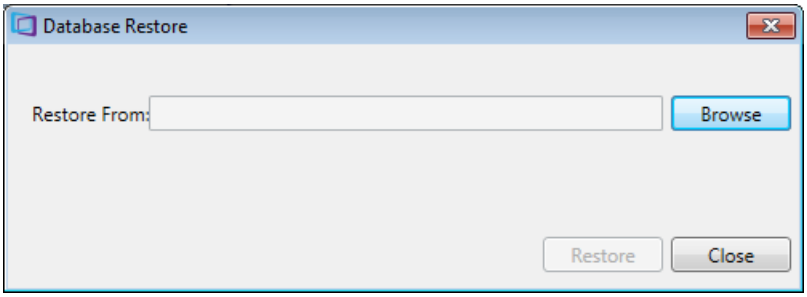
How to restore a database backup

It is best to ensure that the backup file is saved to your local C drive before attempting a restore.

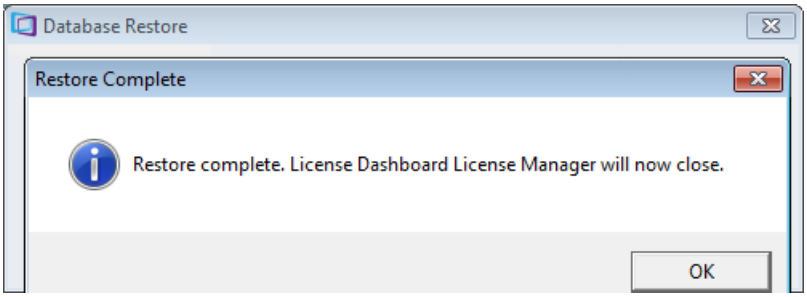
1. Click **Dashboards** in the workspace navigation pane. The Dashboards workspace opens.
2. Click **Restore Database** in the advanced tasks list.



3. In the dialog box, click the **Browse** button to locate your backup file. Then click the **Restore** button.



4. Click the **OK** button to confirm that the Database Restore is complete. License Manager will close automatically.



5. Re-open License Manager and verify that your data has been restored as expected.

Importing a Dictionary

When a License Manager database is first created, a dictionary will not be present. It is important that a dictionary is imported before you start to use License Manager.

License Manager uses dictionaries to populate many of the drop-down list selections within the product and for the product recognition facilities within the data cleanse workspace. Dictionaries contain details of manufacturers, products and product recognition signatures.

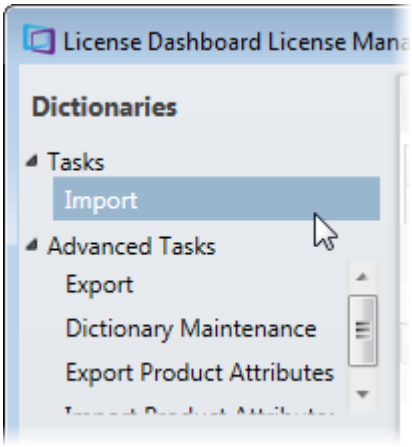
Importing the default Dictionary

Before you continue, ensure you have the most recent version of the dictionary file. License Dashboard Ltd. update dictionaries on a daily basis. These are available to download from the License Dashboard website - http://www.licensedashboard.com/LatestDownloads/Login.aspx. You can log in using your forum user name and password.

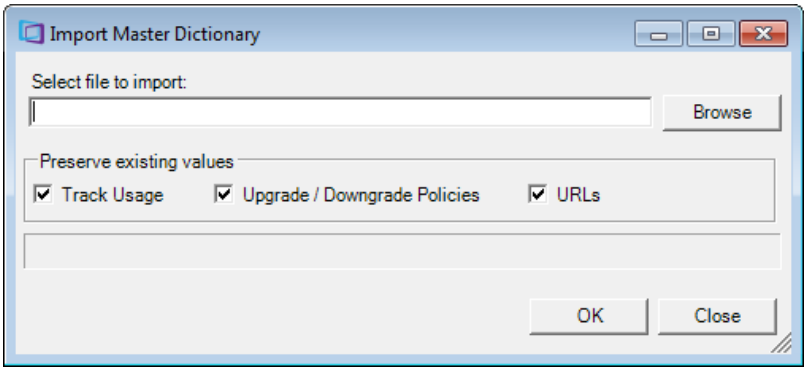
License Dashboard Ltd. update the dictionary on a daily basis. This allows you to import a new version when it is required. It is good practice to ensure that your dictionary is up-to-date when you are updating your data in License Manager.

How to import a Dictionary

Importing a dictionary can take twenty minutes or longer depending on the speed of your computer and the SQL Server.



1. Click **Dictionaries** in the workspace navigation pane. The Dictionaries workspace opens.
2. Click **Import** in the Tasks List. The Master Dictionary Import window is displayed.



3. Click **Browse** and navigate to the folder containing the Dictionary file. Select it and click **Open**.
4. Select the **Preserve Existing Values** options. Note: If this is a new database, these options do not need to be selected.

- Tick **Track Usage** to preserve any track usage settings that have been applied to software usage items
- Tick **Upgrade / Downgrade Policies** to preserve any upgrade and downgrade licensing policies which have been applied to manufacturers in the dictionary
- Tick **URLs** to preserve any URL details which have been added to manufacturers or products in the dictionary

5. Click **Import** to begin the Dictionary Import process.
6. The **Import Completed** message is displayed when the import process is complete.
7. Click **Close** to close the dictionary import screen.

Choosing Application Settings

The application settings control some of the features in License Manager. This allows you to define how you use these features and how they operate. The application settings are split into three tabs:

- General
- Reports
- Custom fields

General

In License Manager, you can adjust the general application settings depending on how you manage your licenses. There are five general settings:

Application Modes

There are two **Application Modes**.

- The **Executive Mode Enabled** field will limit the workspaces visible in License Manager. The executive mode only displays the dashboards workspace and the reports workspace.
- The **Data Cleansing Enabled** field will enable the EXE mapping and ESI mapping tabs in the data cleanse workspace. This allows users to manually match unknown .EXE files and ESI to products in the dictionary.
- The **Contract Workspace Enabled** field will enable the contract workspace. This allows users to manage their contracts and the license entitlement it provides. This is switched off by default

Data Management

Data management allows you to control how License Manager handles data in relation to your data import schedule. The data management settings should be set to reflect your import schedule.

Each time data is imported, License Manager will add devices and installs, and decommission those that are not active. There are two options *Please note, these values are displayed at the bottom of the notifications dashboard:*

- **All devices/installs not included in the imported data will be archived**. When you import data, any devices or installations which currently exist in your database but do not exist in the new data will be archived
- **Any devices/installs not imported within the last x days will be archived**. When you import data, any devices or installations which currently exist in your database but do not exist in the new data will be archived after a number of days has passed. Type the number of days to wait before archiving

Data Comparison

License Manager shows how your data changes over time.

- **Default comparison range x days**. Define the default comparison range here, relative to the latest import

Contract Separation

Adjusting the Contract separation setting will affect what you can see and do in the License Entitlements, and Software Usage workspaces.

There are two options for the **Separate Out Contract** setting:

- **Combined** displays the contract and non-contract license entitlements, and the software usage, in the same tab.
- **Separate** displays license entitlements and software usage for contract and non-contract licenses in separate tabs.

Software Usage Management Mode and Software Usage Promotion Mode

Adjusting the **Software Usage Management Mode** and the **Software Usage Promotion Mode** will affect what you can see and do in the Software Usage workspace.

There are two options for the **Software Usage Management Mode**:

- **Simple** accepts the management of software usage in the business unit it is deployed in. It disables the Software Usage Promotion Mode. This is recommended if license compliance is managed strictly within each department of an organization.
- **Advanced** requires the management of software usage to be accepted in the business unit it is deployed in or promoted to a parent business unit for management. This is recommended if software usage is transferable between departments in an organization.

There are two options for the **Software Usage Promotion Mode**:

- **Basic** allows software usage to be promoted in a single operation. This is recommended if a single team manages all business units.
- **Advanced** requires several stages of software promotion. This is recommended when different users have specific responsibilities for different business units.

Reports

License Manager has the facility to produce and share reports based on the data in the database. There are two reports settings:

Cloud Console URL

Reports can be published to a URL for sharing purposes. The reports tab allows you to set a URL to share your reports to.

Behaviour

When a report is accessed in License Manager, the data you are viewing can be automatically or manually refreshed. Large databases may take longer to refresh the data than small databases.

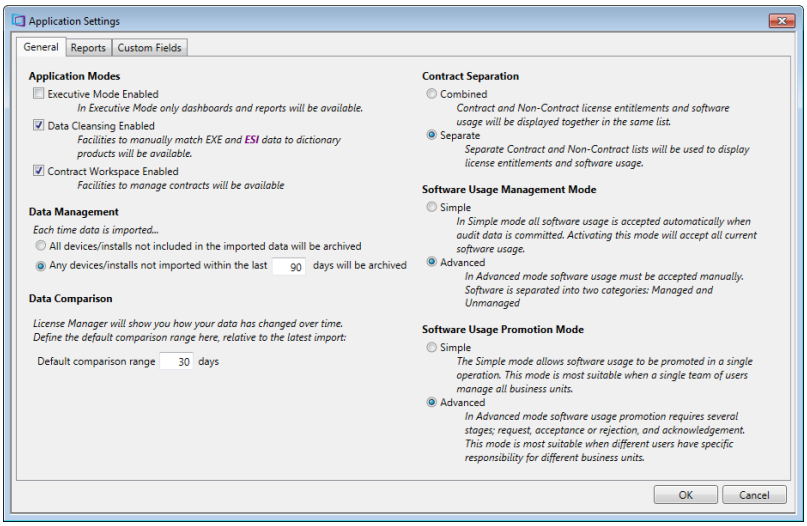
The **Auto-run Enabled** feature allows you to automatically refresh the data in the report each time it is viewed.

Custom Fields

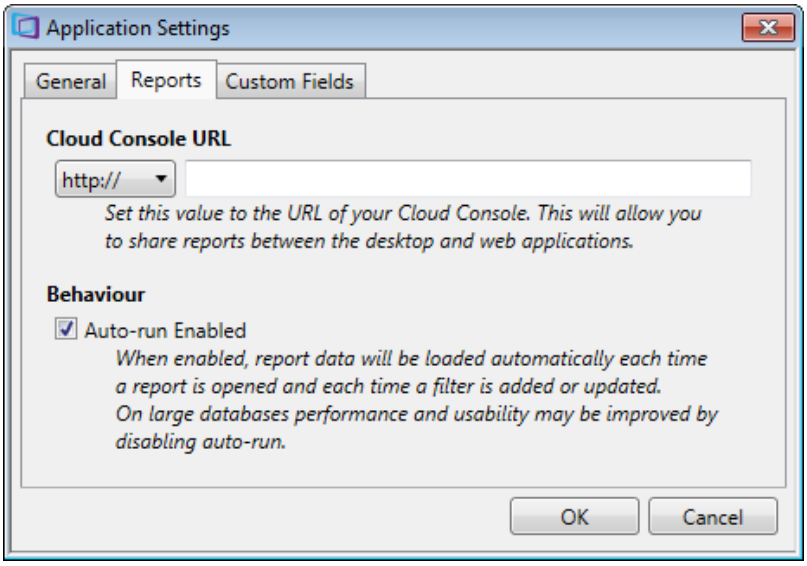
Custom fields are used to add additional information to licenses, business units and devices. The custom fields tab allows you to set a name for these fields.

How to change application settings

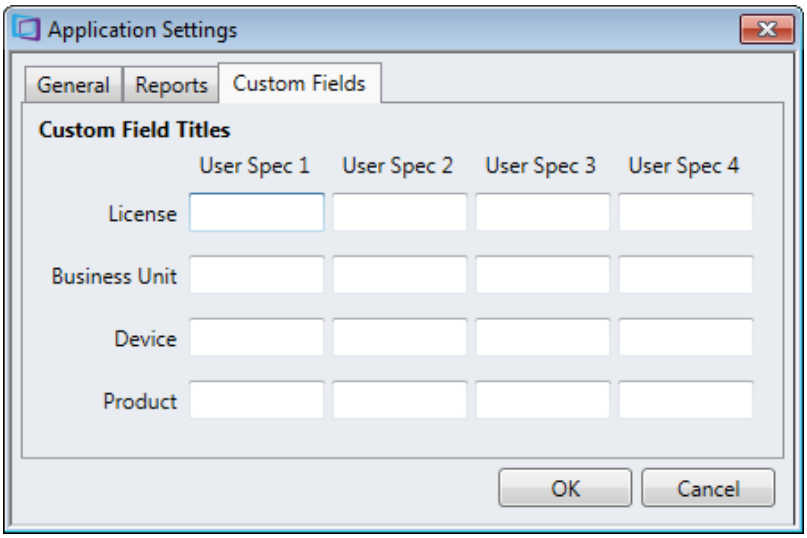
1. Click **Dashboards** in the workspace navigation pane. The Dashboards workspace opens.
2. Click **Application Settings** in the tasks list



3. Choose the general application settings you want to apply
4. Click **Reports**.



5. Choose the reports application settings you want to apply
6. Click **Custom Fields**

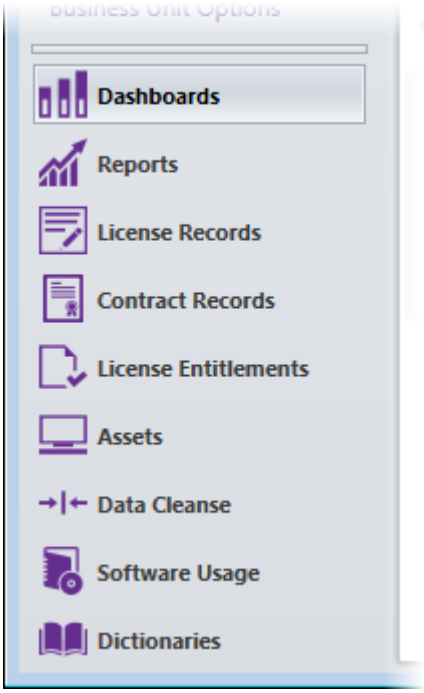


7. Type to rename the fields
8. Click **OK**. The application settings have been changed.

INTRODUCTION TO WORKSPACES

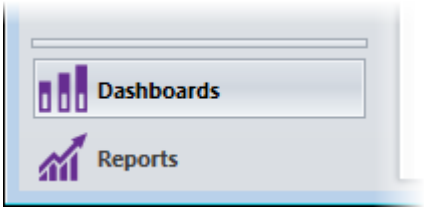
License Manager consists of nine workspaces. Each workspace is associated with a specific process or group of tasks.

The default workspace when opening License Manager is **Dashboards**. Switch between workspaces by clicking the icons at the bottom left-hand side of the License Manager window. This area is called the **workspace navigation pane**.

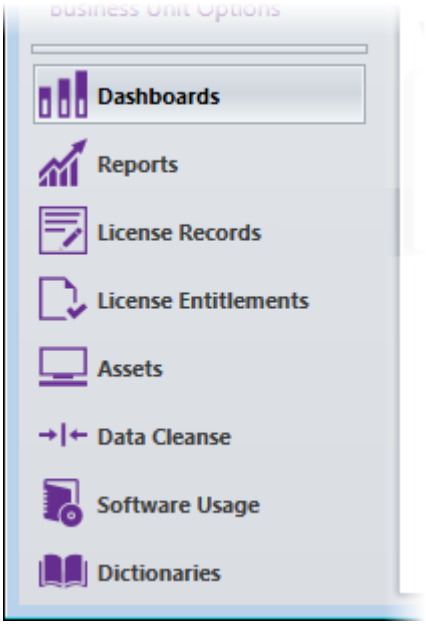


The number of visible workspaces can be limited using the Application Settings task in the dashboards workspace.

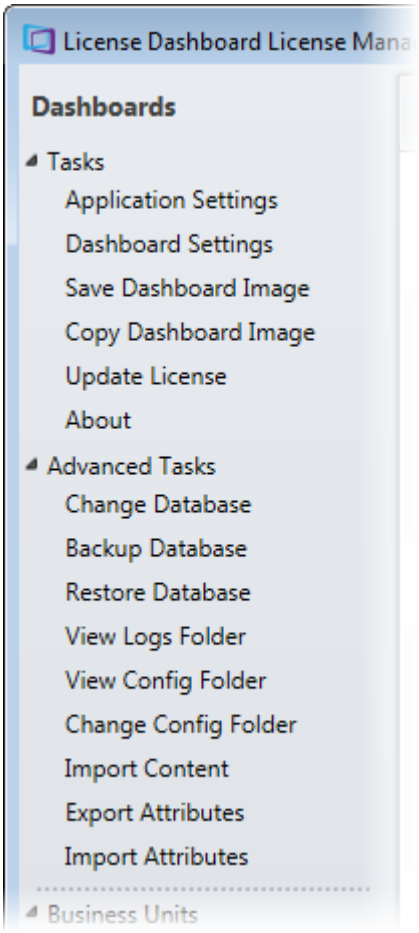
- The executive mode will only display the dashboards and the reports workspaces.



- The contract records workspace may also be disabled.

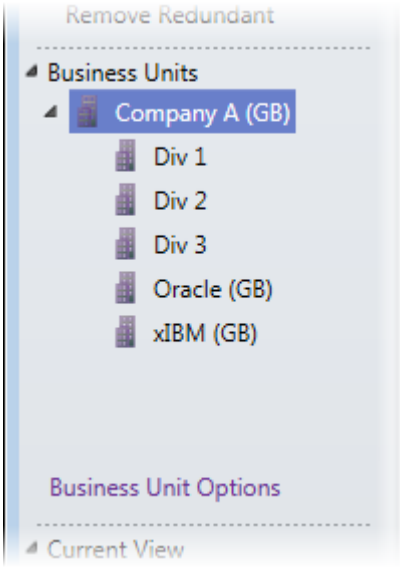


Different tasks can be performed in each workspace. There are two context sensitive tasks lists showing the tasks and advanced tasks that can be performed in the workspace.



Business Units

Business units allow you to group your devices according to the purchasing boundaries for your licenses. You set up business units by department, geographical location or however you see fit. Business units also allow you to easily apply contract entitlement to a group of users or devices.

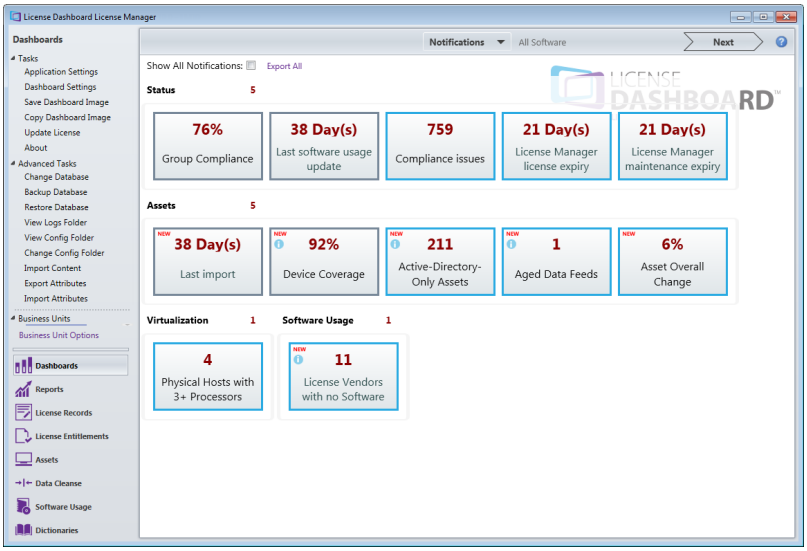


Each business unit has its own license records, contract records, license entitlement, assets and its own record of software uasage.

Please see the License Manager User Guide for further details.

Dashboards

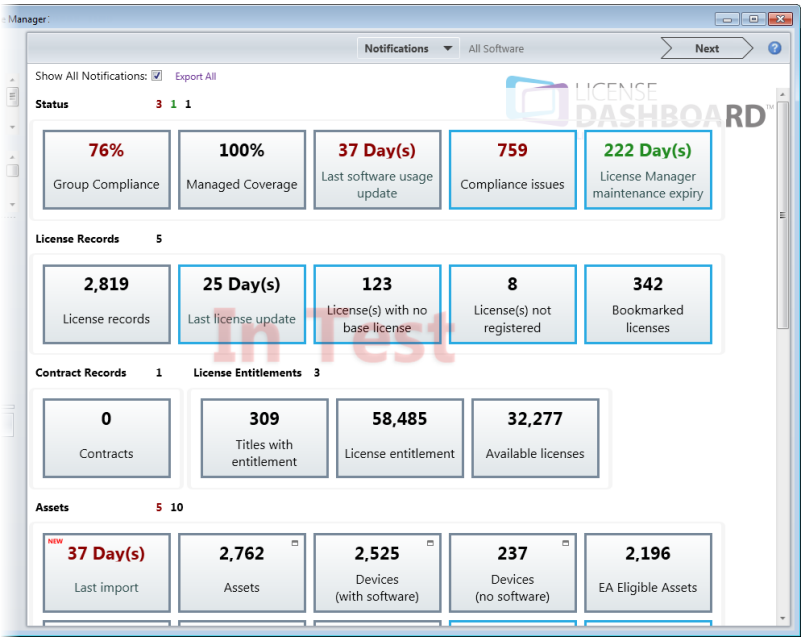
The dashboards workspace contains a series of dashboards with highly interactive charts which provide a graphical representation of your organization's licensing data. Results can be displayed for the entire organization, or they can be filtered by business unit.



- **Tasks**: Contains a list of tasks that can be completed from the Dashboards workspace.
- **Advanced Tasks**: Contains a list of advanced tasks that can be completed from the Dashboards workspace.
- **Group or Unit compliance**: Shows the compliance position for the selected business unit. If no business unit is selected, it shows the compliance for the entire company. The calculation gives the total number of licensed installations as a percentage of the total number of installations. The figure is color-coded: 0 to 80% compliance results in a red figure, 80 to 90% an amber figure, and 90 to 100% a green figure.
- **Interactive charts**: Shows summaries of the License Manager data in graphical form. The charts can be manipulated by clicking on the relevant area with the mouse, allowing the user to drill down into the data.
- **Notifications, Compliance, Maintenance, Metering, Treemap and Virtualization Dashboards**: Use the drop down menu and the **Next** and **Previous** navigation controls to switch between the six dashboard screens.
- **Workspace Navigation**: Contains the list of available workspaces that you can navigate to.
- **Business Unit Navigation**: Allows the charts to be filtered by business unit.

The Notifications Dashboard

The notifications dashboard displays a series of notifications covering most areas of the License Manager database. The notifications provide a snapshot of the status of each of your workspaces and highlights any actions that are needed to help maintain your database.



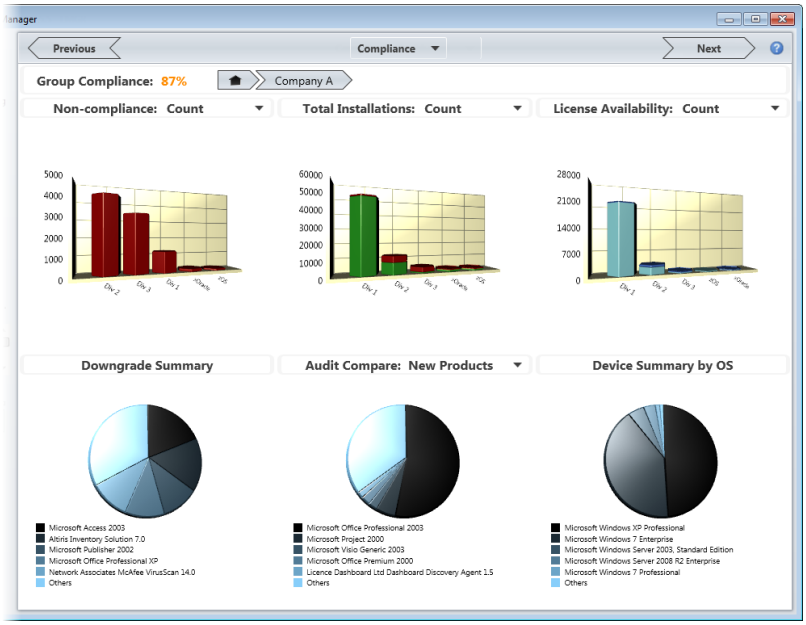
Each notification is color coded according to its urgency:

- Red indicates that the notification requires urgent attention
- Amber indicates that the notification requires attention, but it is not urgent
- Green indicates that the notification does not currently require attention
- Black indicates that the notification is for information only

By default, only red and amber are displayed. Tick **Show All Notifications** to display every notification which is currently triggered.

The Compliance Dashboard

The compliance dashboard allows you to visualize your organization's licenses and software install data in a series of interactive charts. This enables you to get an overview of your organization's license compliance status.



More about Interactive Charts

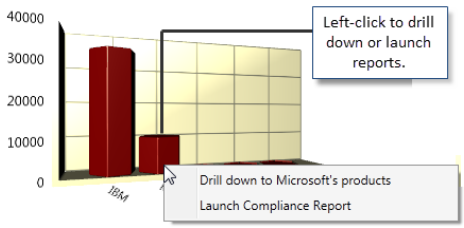
The charts available within the compliance dashboard are as follows.

- **Non-Compliance** is a column chart with one series showing the top most non-compliant items within the selected business unit, manufacturer, or product family. Non-compliance is shown as a percentage value, count or cost, with the items sorted in descending order by non-compliance and then by total number of installations.
- **Total Installations** is a stacked column chart with two series. The green series shows the total number of licensed installations within the selected business unit, manufacturer, or product family. Total Installations is shown as a count or cost. The red series shows the total number of non-licensed installations. The whole stack (red plus green) gives the total number of installations.
- **License Availability** is a stacked column chart with two series. The light blue series shows the total number of licenses available for allocation within the selected business unit, manufacturer, or product family. License availability is shown as a count or cost. The darker blue series shows the total number of licenses that are either reserved or on-order (i.e. unavailable).
- **Downgrade Summary** shows products within the selected business unit that have downgrades allocated. The top five products are shown according to number of downgrades allocated. The sixth item shows a combined total for all other products.
- **Audit Compare** compares data from the last fully completed audit and the previous fully completed audit, filtered on the selected business unit. There are three variations of this chart, selectable using the drop-down list in the title bar.
    - *New Products* shows products that were found in the last audit, but were not found in the previous audit. The top five products are shown according to the number of installations. The sixth item shows a combined total for all other products.
    - *Dropped Products* shows products that were not found in the last audit but existed in the previous audit.
    - *New Installs* shows products that existed in both audits, but for which the number of installations has increased.

- **Device Summary by OS** shows the number of devices in the selected business unit by operating system. The top five operating systems are shown according to number of devices. The sixth item shows a combined total for all other operating systems.

How to drill down into your data

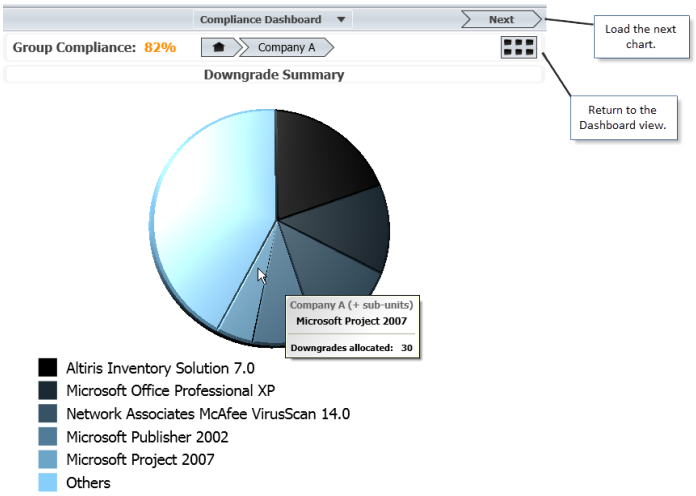
Left-clicking on a column in a compliance column chart allows you to drill down into the data and launch reports. This provides a more detailed view of a particular business unit, manufacturer or product family.



By default, the compliance charts will initially display one item per manufacturer within the selected business unit.

- Click a manufacturer item to display one item per product family within the selected manufacturer.
- Click a product family item to show one item per product (version) within the selected product family.
- Right-click to return to a higher level in the drill-down.

Click on the title of any chart to open and examine it in more detail.



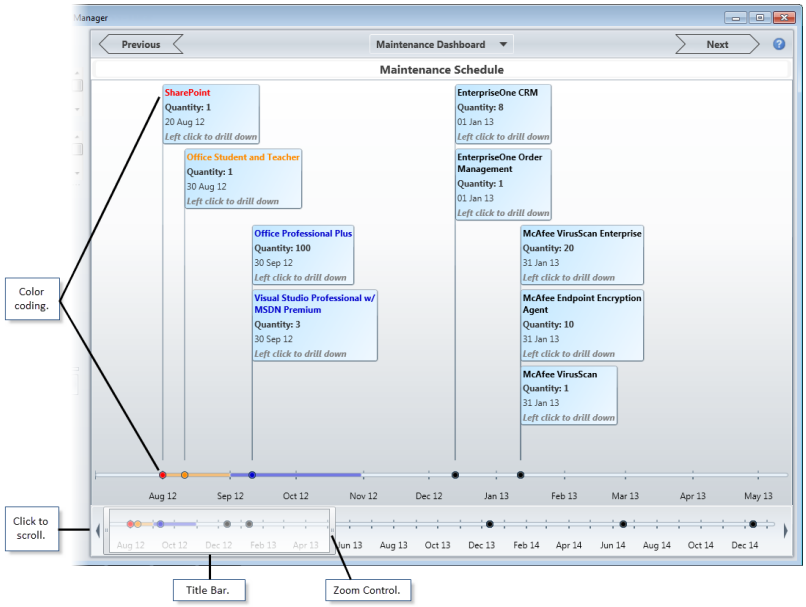
Click the icon at the top right of a chart view to return to the Dashboards workspace.

The Maintenance Dashboard

This chart enables the user to see which renewals need urgent attention. In its default, zoomed-out position, it covers 30 days prior to the current date, and up to the date of the last maintenance expiry for the selected business unit. Points on the timeline represent individual maintenance items.

The details of the individual maintenance items are shown on flags attached to the points. Items in the timeline, and the text on the flags, use color coding:

- Red : Maintenance expires today or has already expired
- Orange: Expires in next 30 days
- Purple: Expires in next 30 to 90 days

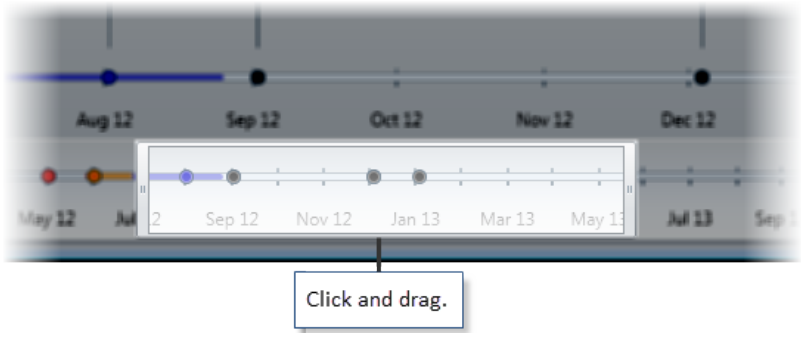


In the zoomed-out multiple-chart view, details of the items can only be seen using the tool-tips. This chart is best viewed by using the zoom in option. In the screenshot above, we have zoomed in to view only May 2012 to November 2014.

How to zoom in to the Maintenance Schedule

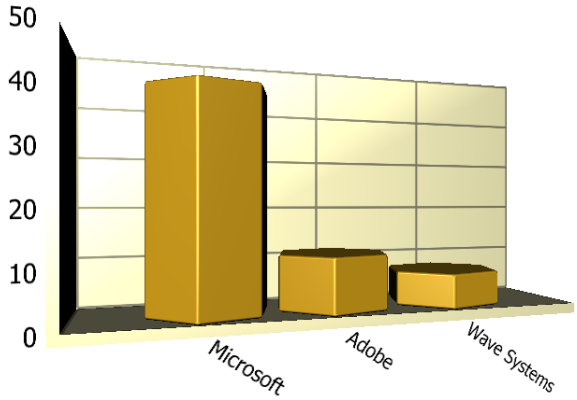
1. Decide which period on the title bar you wish to view in more detail.
2. Click and drag the left and right zoom controls on the title bar so that the relevant period is displayed in the upper window.
3. Adjust your view as needed using the left and right scroll arrows.

To move to another area on the timeline, click and drag your selected area on the title bar to move the selection left or right.

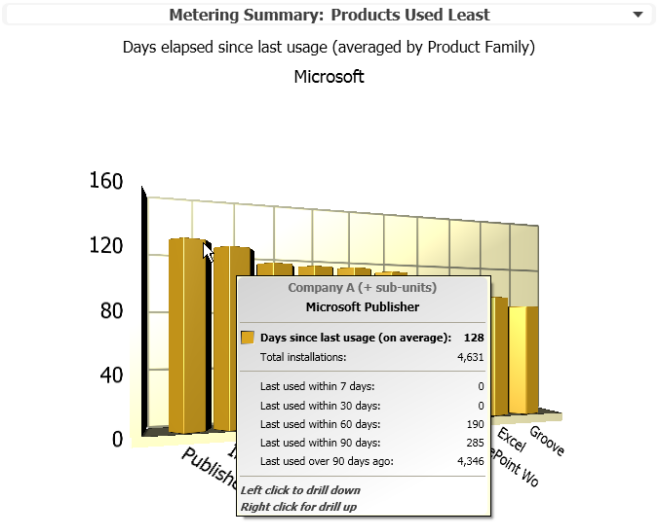


The Metering Dashboard

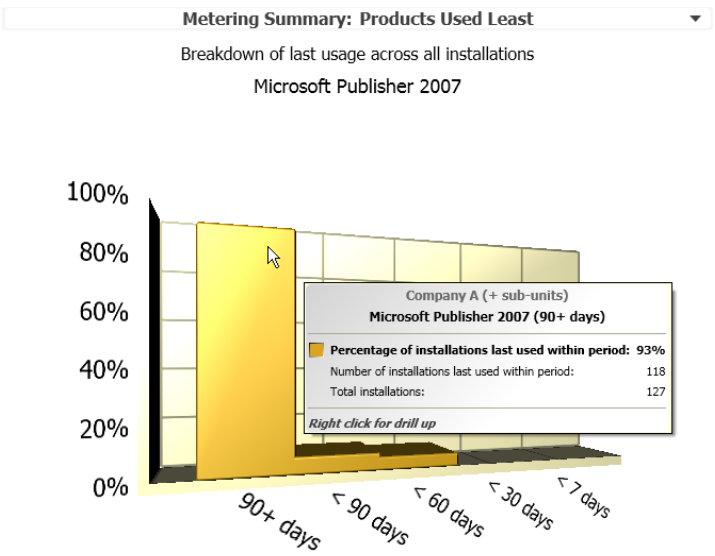
The Metering Summary chart on the Metering Dashboard screen allows you to quickly visualize the *most used* and *least used* products in your organization. Choose which summary to view using the drop-down list at the top of the metering dashboard window.



Left-clicking on any of the columns in the Metering Summary allows you to drill down into the data and launch reports. This shows which products and versions are used most, or least, in your organization. Hovering the mouse pointer over any column shows a detailed breakdown of the data.

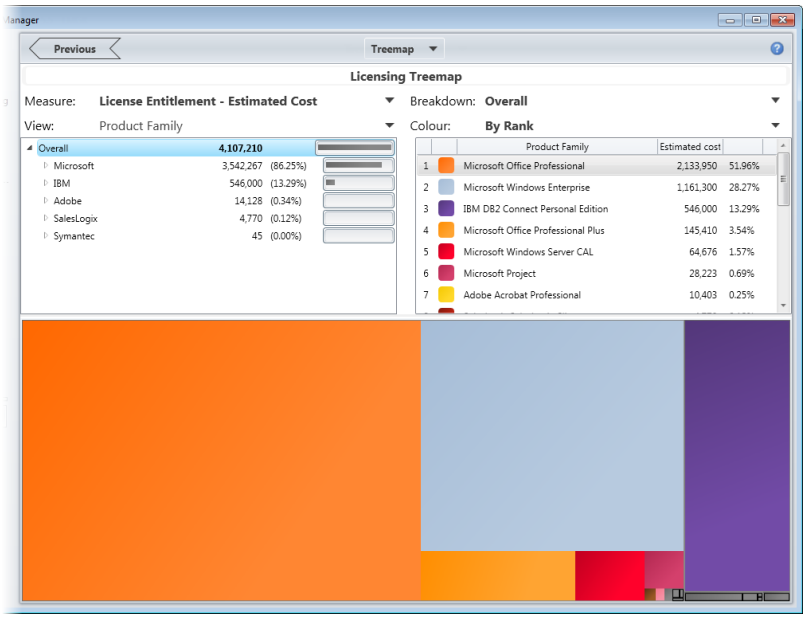


Left click on a column to drill down further and find out how often a particular product version is being used in your selected business unit, or across your entire organization.



The Treemap Dashboard

The treemap dashboard allows you to display data in a way which helps you to visualize the most owned and used licenses and their estimated costs to the business. You can see non-compliant items and the estimated cost to purchase enough licenses to make them compliant. You can also see true-up items and the estimated cost to purchase the next true-up.

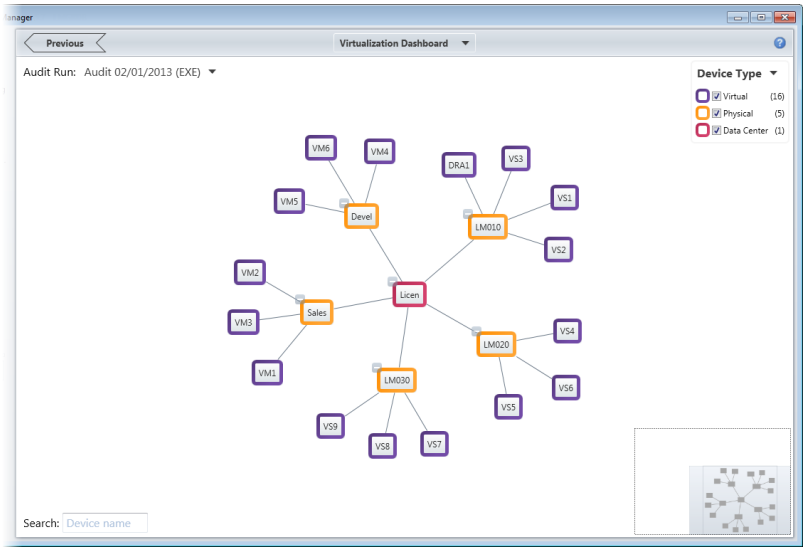


The chart and table is linked so that when an item is selected it is displayed in each table and in the chart. Items in the chart are sized according to their proportion of the overall quantity. *For example, in the above screen shot, the license entitlement with the largest estimated cost is the IBM Document Manager product family. This is color coded yellow and occupies the largest space in the chart.*

You can alter the measure to display different data and the data can be viewed by product family or manufacturer and broken down by business unit, environment or country of use.

The Virtualization Dashboard

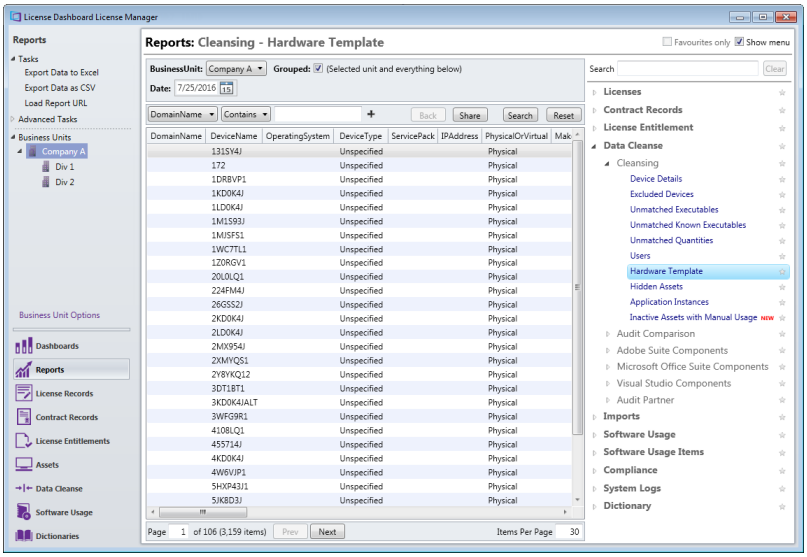
The virtualization dashboard allows you to display data in a way which helps you to visualize the structure of the virtualization environment in the business. You can see each data center in an organization, the servers hosted at the data center and the virtual devices hosted on each server.



The structure of the virtualization environment is based on the selected audit run and you can view data from other audit runs. The display can be changed to highlight the devices by device type, environment, operating system, make and model.

Reports

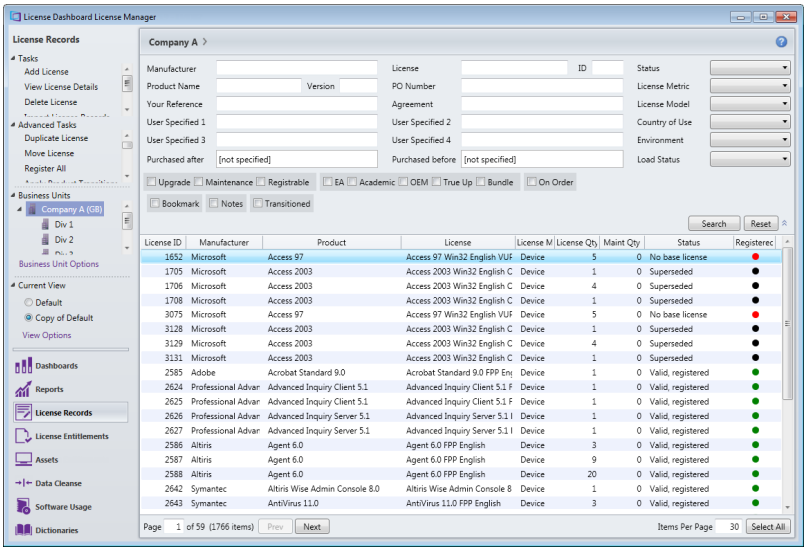
Specific reports are available through the reports workspace. Filters can be applied to help create targeted reports. The returned data can be exported as a .CSV or Excel file.



Detailed explanation of the reports workspace can be found in the License Manager User Guide.

License Records

The basis of any good software asset management program is to keep accurate and up-to-date software license information, together with processes for controlling and maintaining its accuracy. The license records workspace allows organizations to record, maintain and protect their license evidence, which has been provided by manufacturers or resellers.

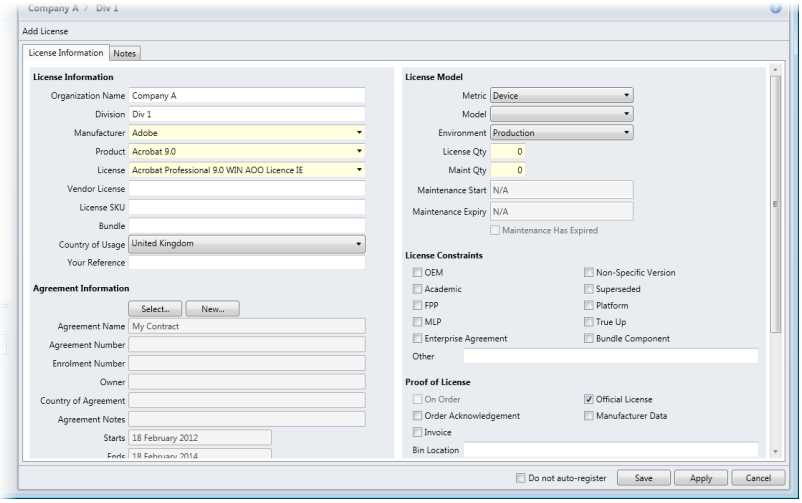


Within the license records workspace, the following records should be recorded and securely archived:

- **Order Acknowledgements** are receipts received from your reseller and act as a proxy license until you receive a copy of the license certificate. These can be used as a proof of purchase and allow you to use the software. However, they must have been provided to you by an authorized reseller.
- **License Certificates** are the official certificates that are provided by the manufacturer. They should be archived and maintained effectively. Each certificate grants your organization the right to use one or more copies of software and are supplied in many formats (paper-based or electronically). These certificates will supersede the order acknowledgments. Due care should be taken when recording this evidence, in order to avoid duplication of entitlement.
- **Fully Packaged Products (FPP)** - this type of license evidence is generally purchased from a reseller or retail outlet and it is typically received in a shrink wrapped box. In the box, there is usually a CD (also known as media), user manual and an end lser license agreement (EULA). As with a license certificate, these contents should be archived effectively and stored securely.
- **Manufacturer Consumption Data** - over time, order acknowledgments and license certificates go missing and, therefore, some organizations may lose entitlement. However, if these licenses have been purchased under volume license programs, then many manufacturers can provide you with purchase history records. These records are recognized as suitable evidence, but their accuracy can sometimes be questionable and, due to acquisitions and mergers, may not be a complete record.
- **Reseller Purchase History Data** records can also be used, but caution should be applied. Many organizations can purchase from multiple resellers and agreements can be associated to different resellers over a period of time. The danger is that you may not remember which reseller managed which agreement. The manufacturer consumption data is a much better source of information as all resellers are legally bound to report to the manufacturer, the acquisition of a license, when made.
- **Original Equipment Manufacturer (OEM)** software is purchased alongside a system or hardware parts. Certain OEM programs have limited functionality, but most do not. OEM software is often cheaper than the full versions. With regard to managing this license entitlement, it is important to remember that the entitlement belongs to the hardware and not to the organization. Therefore, when the hardware is retired and removed from the organization, the entitlement goes with it. Most organizations using License Manager do not record the license evidence appended to the hardware. However, they do check its authenticity.

Adding a License

The process of adding a license is simple, but it is important that the product, the license metric and the model are defined correctly. By recording this information accurately, the behavior of License Manager is optimized and ultimately reduces the effort required to manage your license entitlement and compliance.

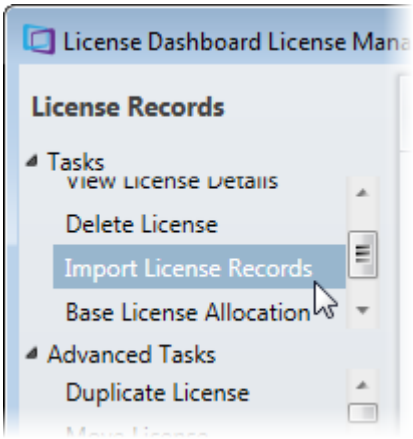


When adding the license it is best practice to ensure that the following information is recorded:

1. Record manufacturer (e.g. Microsoft), product (e.g. Office Pro 2003) and license description (e.g. Office Pro 2003 Select English 1YR SA)
2. Associate the license to a license agreement (e.g. Microsoft Select 6.0) or a fully packaged product (FPP)
3. Record the purchase information, such as purchase order, invoice and cost
4. Select a license metric, such as device, user, site, processor or client access license(CAL)
5. Select the license model. This defines the dependencies associated to the license purchase, such as maintenance, which will have an expiry date.
6. Select the relevant proof of license and reference where the evidence is stored or saved.

Importing License Records

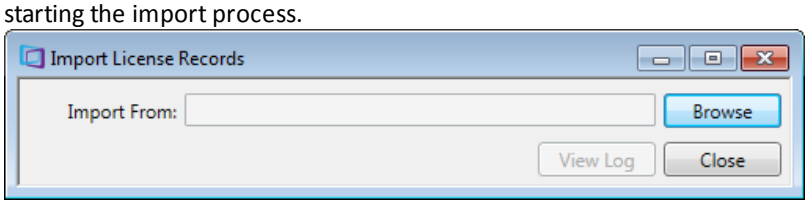
The alternative to adding a license manually, line by line, is to complete a bulk import.



Within the License Manager, there is a function that enables you to import either a Microsoft license statement (MLS) or a pre-populated spreadsheet in the approved XML format.

The MLS file used in the license records import process is an Excel spreadsheet. You will need to know the Office version running on your PC to import an MLS. More information about MLS file imports can be found in the License Manager User Guide.

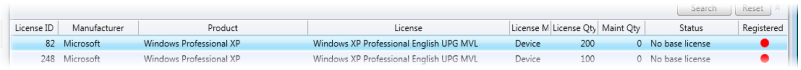
A license import template can also be populated in Excel to import into the license records. This spreadsheet must be saved in XML data format (i.e. as a .XML file) before starting the import process.



Verifying and Registering a License

Once you have entered all the license details, License Manager will then verify the license record and assess its current status. The built-in license intelligence checks that the license dependencies (e.g. license model etc.) have been correctly referenced prior to automatically aggregating them (registering them) into the license entitlement workspace. If you decide to switch off the auto registration of licenses, with the “do no auto-register” option, you can manually register licenses by selecting the ‘register license’ task.

Status of a License



License ID	Manufacturer	Product	License	License M	License Qty	Maint Qty	Status	Registered
82	Microsoft	Windows Professional XP	Windows XP Professional English UPG MVL	Device	200	0	No base license	
248	Microsoft	Windows Professional XP	Windows XP Professional English UPG MVL	Device	100	0	No base license	

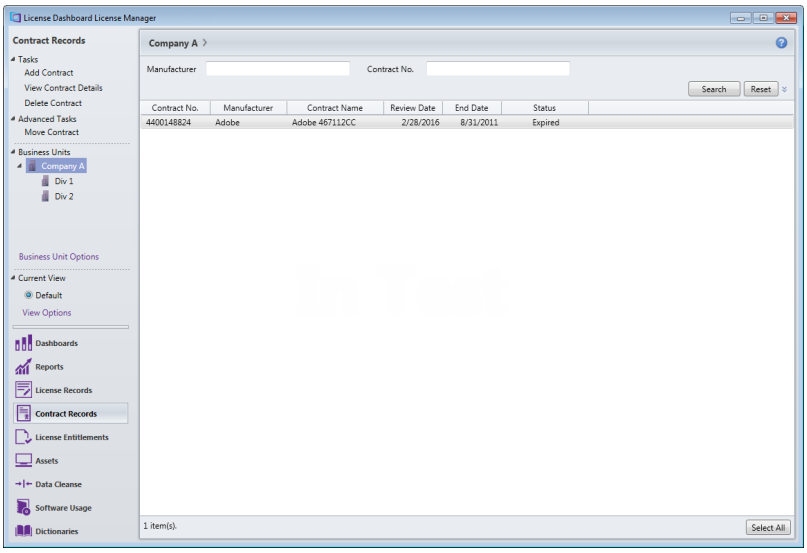
If License Manager is unable to register a new license, then the registered column will show a red indicator and the status column will report one of the following issues:

- **No base license** - this means that the new license is an upgrade or maintenance only license. It requires you to associate it to a previous license purchase (also known as a Base License). Double click on the license and select the base license tab to determine availability of base licenses.
- **Insufficient base licenses** - this means that the new license is an upgrade or maintenance only license, but only has some base licenses allocated, not the full amount. Double click on the license and select the base license tab to determine availability of base licenses. Only licenses not registered to the license entitlements workspace can be used as base licenses. The objective is to add as many licenses as possible without getting any red lights. However it is predicted that you may have some red lights due to the historic methods used when managing your licenses. It is advised that you keep the invalid licenses within the workspace, just in case you find or acquire additional base licenses in the future.

Contract Records

The contract records workspace is used to record the organization's fixed term contracts. These types of contracts are usually agreed directly with the manufacturer and are managed by a delegated reseller.

The contract records enables organization's to keep track of their renewals and associated entitlement. This workspace helps to manage contract renewals. It also provides greater visibility of the organization's contract installation rights.



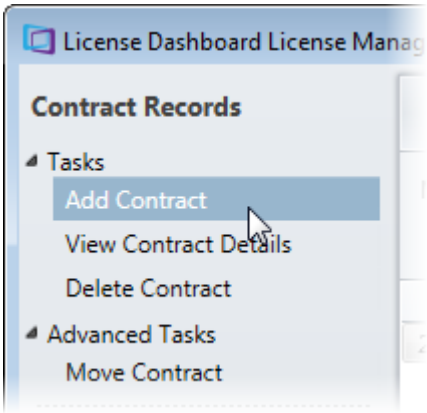
The contract records workspace is deactivated by default. This workspace can be activated using the application settings.

Adding a Contract

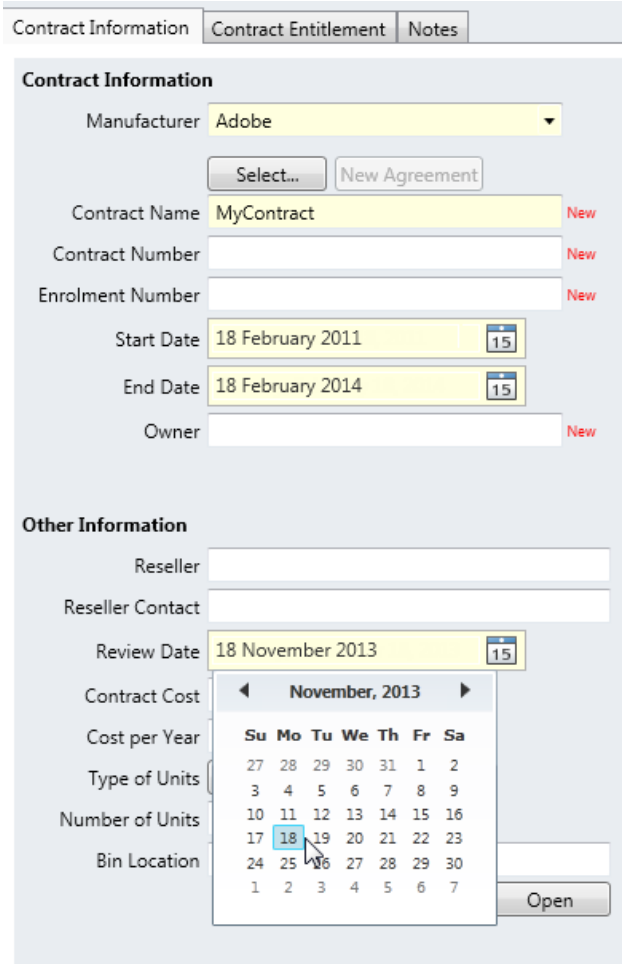
It is essential that the contracts are correctly entered and that all contract entitlement is logged effectively. Often additional entitlement to products that you did not request will be included on the schedule. It is important that *all* products listed are included in the contract records workspace.

How to add a new contract

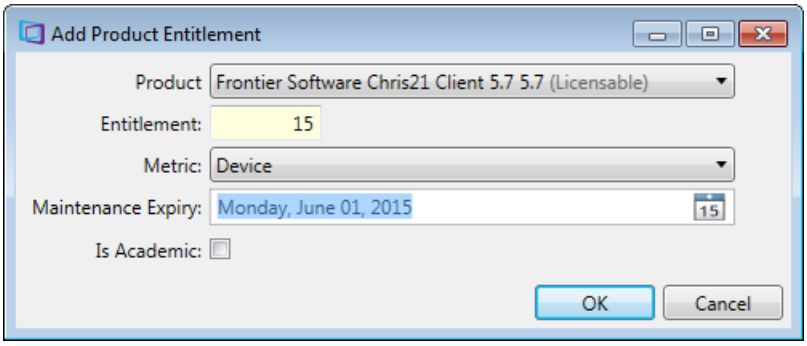
1. Ensure that the correct business unit is selected on the left hand side of the License Manager window.
2. Click the **Add Contract** task in the task list at the top left hand side of the screen.



3. Type in the details of your contract. The yellow highlight indicates fields that are required.

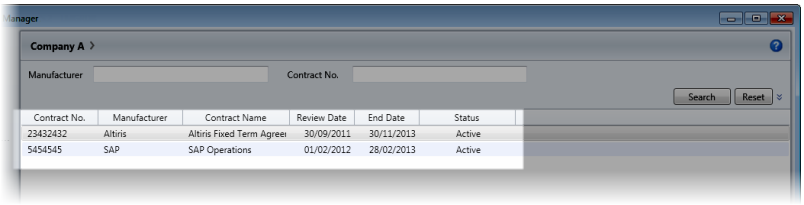


4. Click **Apply**.
5. Click the contract entitlement tab and enter the terms of your contract. Then click the **OK** button.



5. Click the **Save** button.

The new contract has been added to the contract records workspace.

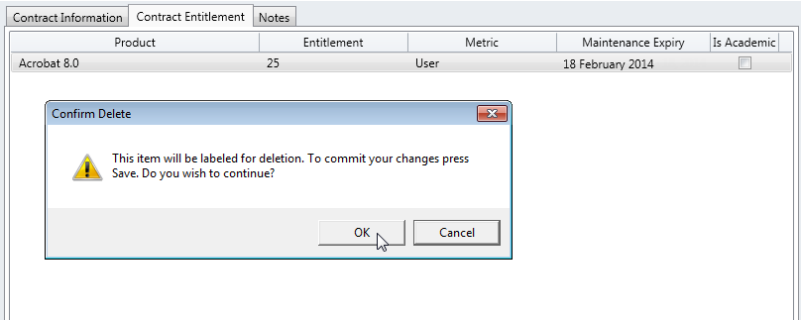


Managing Contracts

When contracts expire, some entitlement remains perpetual (everlasting or continuous). In this case, you can leave the contract within the workspace without removing the contract entitlement. However, contracts or entitlements that are not perpetual should have their contract entitlement removed on expiry.

How to remove Contract Entitlement

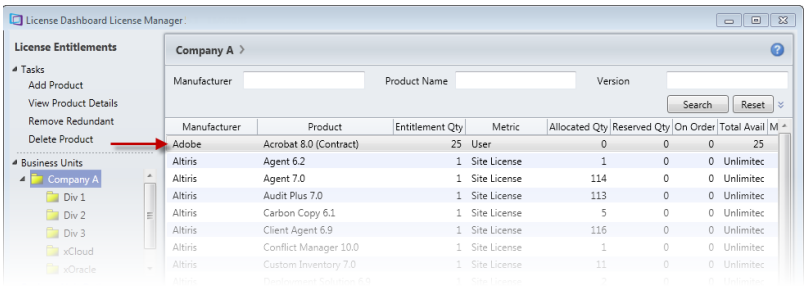
1. Double-click the contract in the contract records workspace.
2. Select the **Contract Entitlement** tab.
3. Left-click on the contract entitlement you wish to delete to highlight it.
4. Click the **Delete** button.



5. Click the **OK** button to confirm the deletion. Then click **Save**.

Contract Entitlement

When contract entitlement is added or edited, the entitlement is automatically aggregated in the License Entitlement workspace. This ensures that the organization has greater visibility of all associated installation rights.



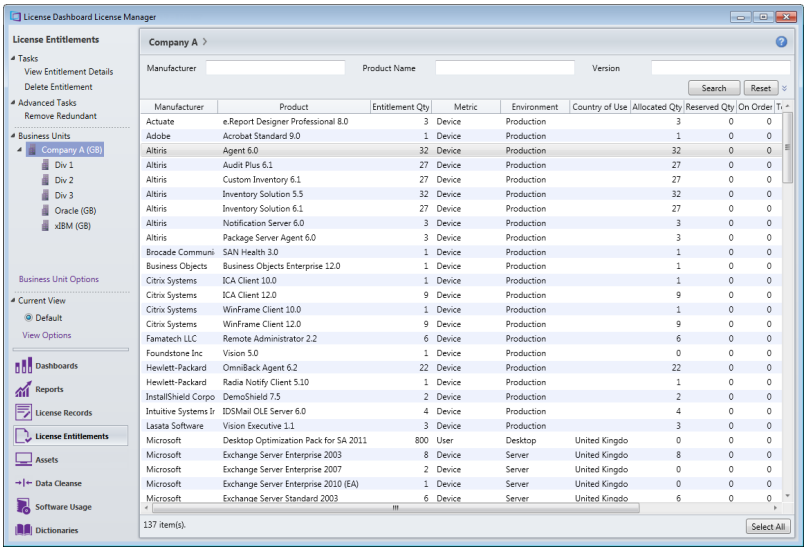
License Entitlements

The license entitlements workspace is the main area within License Manager. From a single view, you can determine what your organization's install rights are, how much of it has been deployed, what is on order and how many licenses you have remaining within the pool. In addition, you can track the maintenance renewals and manage the full lifecycle of your software.

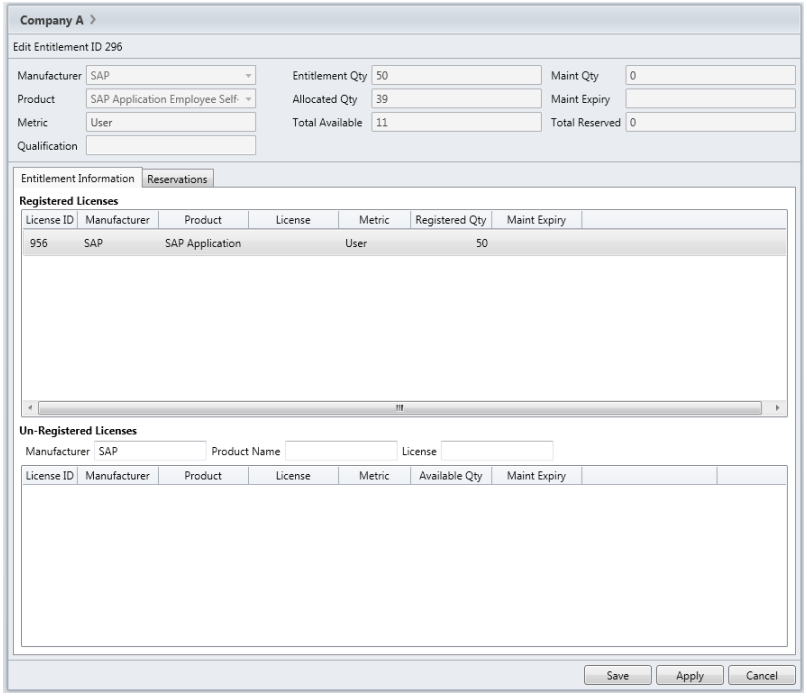
What you can see and do in this section will depend on the **Separate Out Contract** setting you have chosen. Please refer to the Choosing Application Settings for further details.

Combined Setting

For this setting, the license entitlements workspace appears as per the below screenshot:



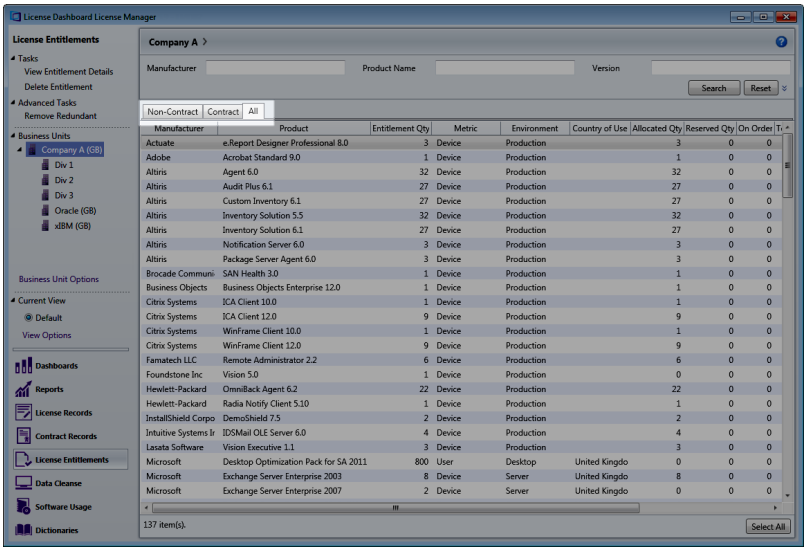
The license entitlement is automatically aggregated from the licensing details in the license records and contract records workspaces. By double-clicking the product description, you can view how the entitlement has been calculated.



If you need to un-register your licenses, so you can re-allocate them as base licenses for instance, this can be administrated here too. Any additions or adjustments are automatically updated in the license entitlement workspace.

Separate Setting

For this setting, the license entitlements workspace separates your license entitlements into two additional tabs, as per the below screenshot:



The two extra tabs display the business unit's (BUs) installation rights.

- The **Non-Contract Entitlement** is associated to all license evidence recorded in the license records workspace.
- **Contract Entitlement** is associated to all evidence recorded in the contract records workspace.

Assets

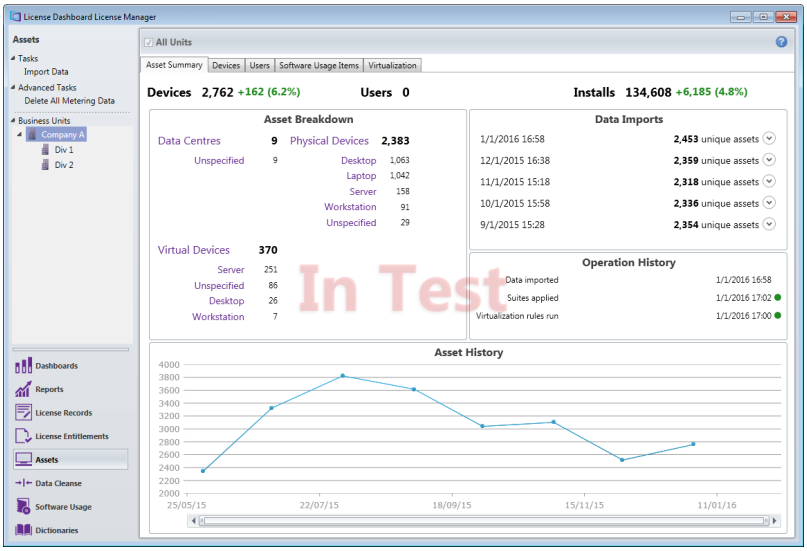
The assets workspace enables organizations to track and manage the assets in their estate.

License Manager works in combination with License Dashboard Discovery or another third party asset inventory solution. It extracts the raw .EXE file or ESI data discovered from each device and distills this information. Utilizing a product recognition dictionary, along with customizable application suite matching and recognition rules, a detailed installed software list is produced. This provides a complete picture of all of the installed products on all of the devices in your organization.

The hardware and install data sourced by an asset inventory solution is imported into the assets workspace. It is used in conjunction with the data cleanse workspace to identify each type of device on your network and the software installed on it.

All discovered software is categorized, indicating which products require licensing and which do not.

Each tab within the assets workspace contains a set of operations to enable this process.



The basic process involves the following steps:

1. Use the Import task to import audit data extracted from a supported asset inventory solution
2. Associate computers to a business unit
3. Perform the recognition process in the data cleanse workspace
4. Apply application suites in the data cleanse workspace
5. Review the results
6. Commit those results to the Software Usage workspace

The following text examines each step in more detail.

Data Extract

The first step is to use the supplied data extract utility to extract the raw .EXE file data from a supported asset inventory solution. This will produce one or more .XML files that can be imported into License Manager. Detailed information can be found in the **License Manager - Data Extract Guide 5.7** PDF.

Import Data

Data is imported using the import data task in the asset summary tab. This adds to the data which already exists in your database. The new data is imported and checked against the existing data, showing new software installations or deinstallations. Over time, a history of the software usage on the device is built up.

Devices

The devices tab in the assets workspace allows you to manage the devices in your organization and each of its business units.. The tab displays a list of devices found for the selected business unit. You can organize, bookmark and move devices between business units.

Data Cleanse

The data cleanse workspace is used to match EXE and ESI file data to products in the dictionary. This enables you to correctly identify which products are installed on which devices.

This process also includes matching groups of products to application suites and creating rules to define which type of product is installed on specific devices.

Software Usage Items

The software usage items tab can be used to review the recognized installed software information through customizable views. To display the summary information, enter any required search criteria, and select search.

The software can be viewed per computer, or aggregated to show the number of installs of each product.

Once the data has been reviewed, it can be committed to the Software Usage workspace using the commit to software usage task. Once the data has been committed it can be assigned to licenses and is included in your compliance calculations.

Virtualization

The virtualization tab can be used to reflect the virtualization environment in an organization. The virtualization environment is displayed in a tree structure. The environment is the root. The host data centers are the first branch followed by the physical servers hosted in each data center. Virtual servers and hosted devices are displayed as guest devices on each physical server.

The software usage on each guest device can be mapped to the host device for licensing purposes. This enables you to define products which are licensed to the whole server but appear as installs on multiple guest devices.

Data Cleanse

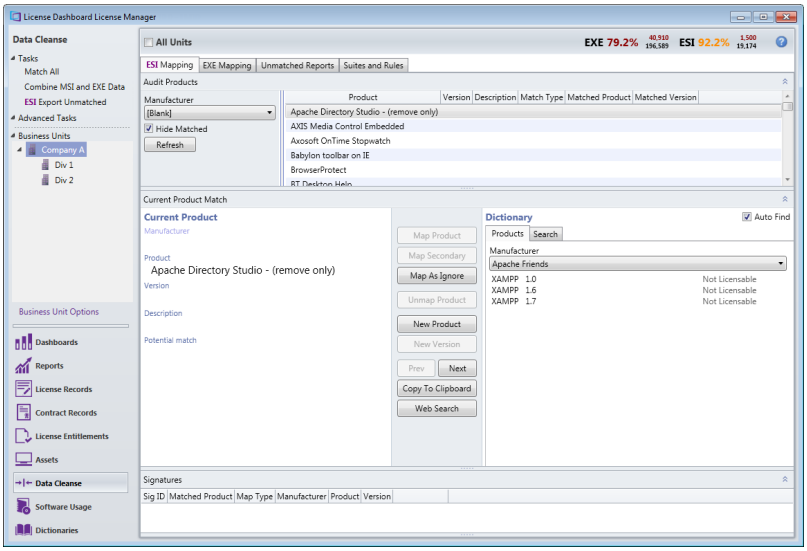
The data cleanse workspace enables you to correctly identify and classify the software which is installed on your devices.

Please note, the Data Cleanse workspace may not be available in your version of License Manager. Access to the Data Cleanse workspace is dependent on your license.

The raw .EXE file or ESI data which is imported in the assets workspace is shown in the data cleanse workspace. The data cleanse workspace works in conjunction with your dictionaries to identify the software an EXE or ESI file represents and match it to a product in the dictionary. This matching process is then replicated across all devices which contain the same files, identifying the products installed across your estate.

Customizable application suite matching and recognition rules are also used to group applications into suites and apply specific products to matched products on your devices.

Each tab within the data cleanse workspace contains a set of operations to take you through the data cleanse process.



EXE Mapping or ESI Mapping

After EXE and ESI data is imported in the assets workspace, the EXE mapping and ESI mapping tabs are made available in the data cleanse workspace.

These tabs have two main functions. The main function is to perform the application recognition process.

The second task enhances application recognition by defining currently unrecognized .EXE files or ESI signatures as either primary or secondary files for a product.

Use the match all task to perform the application recognition process. This will compare the .EXE file or ESI signature associated to each computer against the product recognition dictionary.

Unmatched Reports

The unmatched reports tab in the data cleanse workspace provides additional tools to help with the process of enhancing the product recognition dictionary. It is used in combination with the EXE Mapping tab.

- The **Unmatched Executable** report displays the full list of executables that are unrecognized on each computer.
- The **Unmatched Known Executables** report displays executables that are unmatched and have the same name as an executable that has been assigned as a primary executable of a product. *This report will not run if you are using an encrypted dictionary.*
- The **Unmatched Quantities** report displays unmatched executables along with the count of how many times they occur.

Double clicking on the results from the reports will take you to an instance of that executable in the EXE mapping tab. When there have been changes to the product recognition dictionary, the match all task should be run again for the changes to be represented within the results.

Suites and Rules

Suites are used for grouping applications into application suites. Rules are used for replacing products on specific computers. The suites and rules tab in the data cleanse workspace allows you to define and apply both.

Suites are used to replace individual applications with an application suite. For example, Microsoft Word 97, Microsoft Excel 97 and Microsoft PowerPoint 97 installations on a computer could be replaced with Microsoft Office 97 Std.

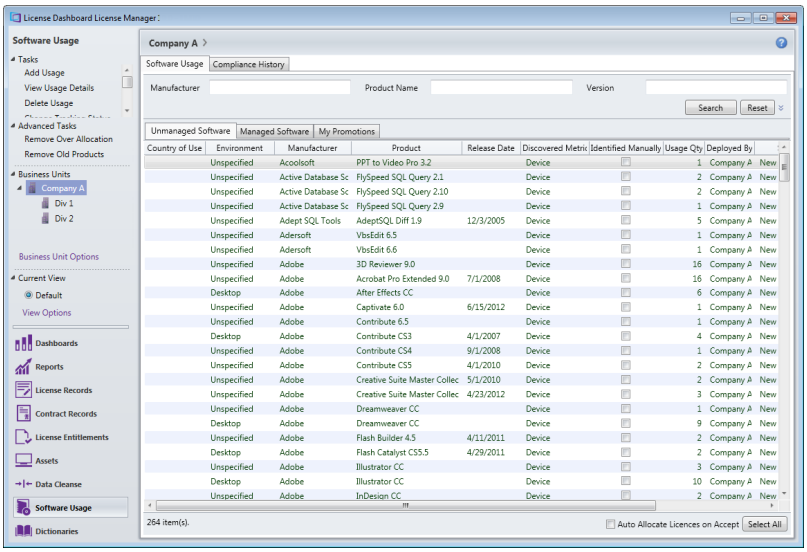
Load an application suite within the top pane by selecting the Load option within that section. Select the apply suites task to apply the application suites.

Rules enable products to be replaced with alternative products on specific computers. For example, if you have several Microsoft SQL Server 2005 installations, but you know two of them are licensed per processor, you can use a rule to replace the Microsoft SQL Server 2005 product description with Microsoft SQL Server 2005 Per Processor on those two computers.

Load a rule within the bottom pane by selecting the load option within that section. Select the apply rules task to apply the rule.

Software Usage

The software usage workspace enables you to manage your installed products. It helps to ensure that you are compliant with the terms and conditions of the license. You can allocate software usage to licenses in this workspace.



The software usage workspace is split into two tabs:

- Software usage. This is used to organize the responsibilities for managing your software usage. It is also used to allocate license entitlement to software usage and ensure compliance
- Compliance history. This displays an overview of the live and historical compliance data for your organization

Dictionaries

Dictionaries are used to populate drop-down boxes within License Manager. They ensure that there is a standard naming convention used throughout the application when referring to Manufacturers, Products and Licenses.

When License Manager is first installed, import the most recent copy of the Dictionary before you attempt to use the software. For more information, please see Importing a Dictionary.

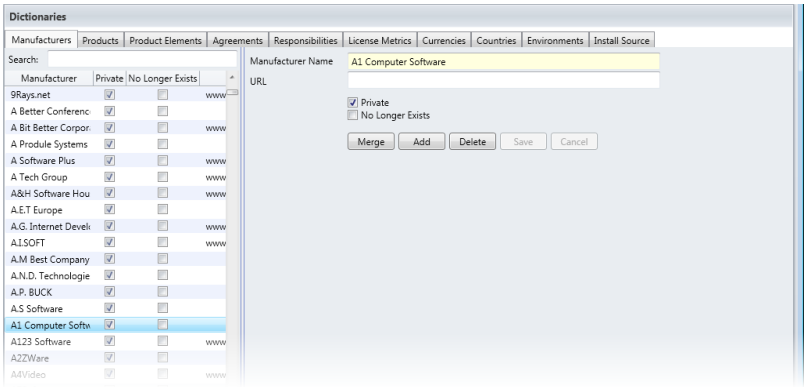
Products should have the same defined name within both Software Usage and License Entitlement. If the names do not match, some tasks which should be automated may need to be completed manually.

Manufacturers, Products, Product Elements, Agreements and ESI Dictionaries

The Manufacturers, Products, Product Elements, Agreements and ESI Dictionaries are all related. For example, when a new product is created, an existing Manufacturer must be selected first.

How to add a Manufacturer or Product definition

There are two ways to add a new item to the Dictionary. The Add button in the Dictionary workspace allows new items to be added.



You can add a new Dictionary definition when adding a license to the License Records workspace. If a Manufacturer or Product is not listed within the drop-down boxes, the new names can be typed directly into the form. The word **NEW** appears in red to indicate that a new definition will be added to the Dictionary when the License Records item is saved.

If you create a new Manufacturer or Product when adding a license to the License Records workspace, it is important to use the same dictionary entry if associating the product's executable within Data Cleanse. Products are unique per Manufacturer.

Product Elements and ESI Dictionary

The Product Elements and ESI Dictionaries consist of an extensive list of .EXE files and their associated size or ESI signatures. Each .EXE file or ESI signature is associated to a Product and assigned a status: Primary or Secondary.

A primary .EXE is classed as the main file used to launch a piece of software. It is always present when the software is installed. A primary ESI signature is data extracted from the main file used to install a piece of software. The secondary .EXE or ESI signature is classed as a supporting to the primary.

When performing the Match All process in the Data Cleanse workspace, only primary .EXE or ESI signatures determine that a software product is installed.

The file name and size are the two key fields used during the Match All process. If the name and size of a .EXE or ESI signature match a primary Product Element within the dictionary, then the Product associated to the Product Element is added as an installed product on the computer it was discovered on.

Other Dictionaries

There are several other Dictionaries available.

- **Agreements** allows you to pre-define all the active and expired software agreements (i.e. Microsoft Select). It is referenced when you add a new license to the License Records workspace. The Agreement Dictionary is also useful when you are trying to remember what agreement you have with which Manufacturer. For example, you may have two purchasing options with Adobe, such as a Cumulative Licensing Program (CLP) or as a Full Packaged Product (FPP).
- **Responsibilities** allows you to define the parties who are responsible for an item of software that is installed on a device in your organization.
- **License Metrics**. One of the main benefits of License Manager is that you can create multiple License Metrics. License Metrics are the constraints used to govern how software usage should be measured. For example, a per-user license is a software license based on the number of individual users who have access to the software. A Concurrent user license is based on the number of simultaneous users accessing the same product. There are many different types of license metrics and all must be managed effectively. The License Metric dictionary allows you to add additional metrics, so you can manage any form of License Entitlement.
- **Currencies** allows you to define any required currencies that need to be recorded for purchases within License Manager.
- **Countries** allows you to add any countries that need to be defined on licenses and the Business Units in your organization.
- **Environments** allows you to define the environments for the devices in your organization. This helps to match license entitlement to software usage in Software Usage.
- **Install Source** allows you to define a list of sources for how installed software has been discovered.

Dictionary Updates

It is important the product recognition dictionaries within License Manager are kept up to date. License Dashboard Ltd. update dictionaries on a daily basis. These are available for download from the License Dashboard website. The updates can be imported using the Import task within the Dictionary workspace. Please see the topic Importing a Dictionary for more information.

Views

The license records, license entitlement, contract records and software usage workspaces have the functionality to create customized views of your records. Creating views enables organizations to report their data in different ways.

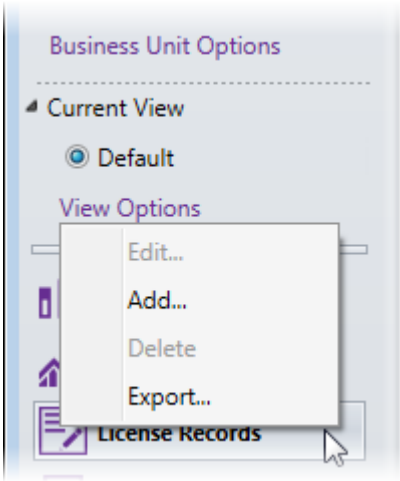
Views are saved locally on your computer and apply only to the workspace you are using when you create them.

Each workspace has its own default View which cannot be changed, but it can be used to create and customize your own personalized reports in addition to those in the Reports workspace.

Custom views are very useful when you need to create detailed management reports.

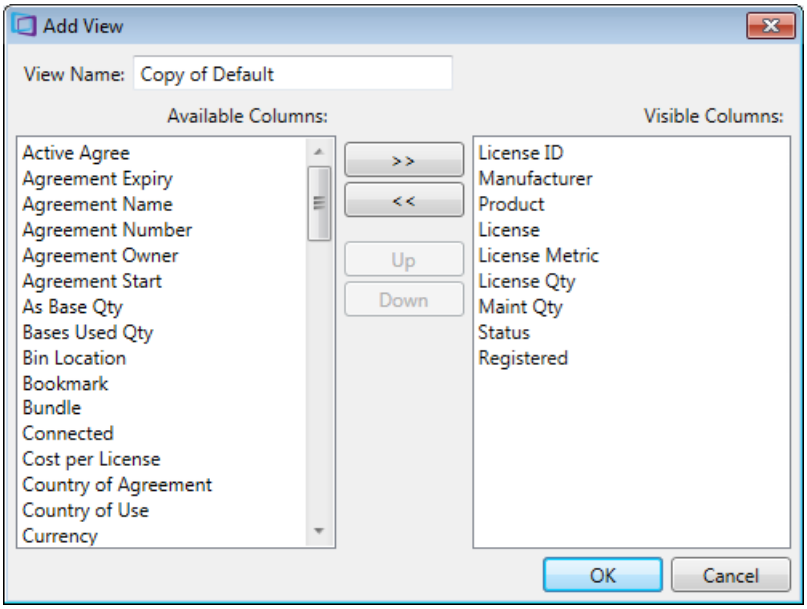
Creating a custom View

To create a new View, click **View Options**, and then click **Add**.



In the dialog box which appears, you can select the columns you need to appear in your custom View.

Add or remove columns and apply filters using the buttons in the center of the dialog box. Once selected, your chosen columns will appear in the right-hand pane. The up and down buttons allow you to choose which order those columns are displayed in the finished view.



Support

Support website: www.licensedashboard.com

Telephone UK/International: +441904 562333

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. 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