Reconcile software

Lab 3.3   15-20 minute

Lab objectives

You will achieve the following objectives:

- All software reconciled
- Software reconciled for an individual publisher
- Software reconciliation grouped by country

> **Lab Dependency:** *Requires the completion of Labs 1.1, 2.1, 2.2, and 3.2*
>
> **Required Resources:** *None*

Scenario

Software reconciliation compares details from software entitlements (how many rights are owned) and from software installations (how many rights are in use) to identify the compliance position. The license metric identified on the software entitlement is required to support this.

Rick Lemm, Software Asset Manager at Cloud Dimensions, Ltd. (CloudD), has been requested to provide the status of software asset compliance and any recommended compliance mitigations to his leadership team. The leadership team is especially interested in the compliance position for Adobe Systems and Microsoft. Though software reconciliation automatically runs each week, Rick must perform on-demand reconciliations to provide the most current information.

Requirements Summary

User Stories

- STRY030301 – Reconcile all software

  As a software asset manager, I need to understand my current compliance position for all software in my environment, so that I can identify any actions needed.

- STRY030302 – Run reconciliation with modified license metrics

As a software asset manager, I need to modify Microsoft Project license metrics and metric attributes, so that I can analyze various compliance positions and determine mitigation options.

- STRY030303 – Run reconciliation grouped by country

  As a software asset manager, I need to group the results of a Microsoft software reconciliation, so that I can analyze compliance by country and determine mitigation options.

STRY030301 – Reconcile all software

Section 1 Run reconciliation

Over the last few days the software asset management team has been making changes to improve compliance. Although software reconciliation automatically runs each week, Rick wants to run a reconciliation on demand to get the most current compliance position details on all software in CloudD's environment

1. If not already, impersonate **Rick Lemm.**

2. Navigate to **Software Asset Workspace > License usage.**

3. Click **Run Reconciliation**.
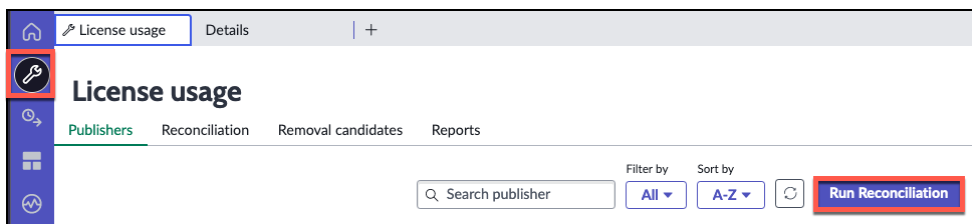
> **Knowledge Check:** *Refer to the Answer Guide at lab's end.*
>
> *1. Why does Rick Lemm, the software asset manager, need to perform this task instead of his software asset administrator, Remy Dashun?*

4. On the Run Reconciliation form, leave the default options as is and click **Run reconciliation**.

5. In the Reconciliation results list, click the **Refresh list** button to refresh to the latest reconciliation. Continue clicking **Refresh List** until the latest reconciliation has a Status of Completed.

Section 2 View publisher results

1. From the License usage view, click the **Publishers** tab.
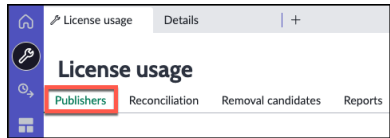
2. Scroll down to the Unpinned publishers to view the publisher license compliance.

|			
Adobe Systems ● 61% compliant	**AspenTech** ● 100% compliant	**Autodesk Inc.** ● 0% compliant	**Citrix Systems** ● 0% compliant
Compliant products 11/18	Compliant products 1/1	Compliant products 0/3	Compliant products 0/2
True-up cost $3.53K	True-up cost $0.00	True-up cost $0.00	True-up cost $0.00
Over-licensed amount $1.59M	Over-licensed amount $9.1K	Over-licensed amount $0.00	Over-licensed amount $0.00
Potential savings $22.35K	Potential savings $0.00	Potential savings $0.00	Potential savings $0.00
Cloud Dimensi... ● 100% compliant	**Corel** ● 100% compliant	**ej-technologies** ● 0% compliant	**ESRI** ● 0% compliant
Compliant products 1/1	Compliant products 1/1	Compliant products 0/1	Compliant products 0/2
True-up cost $0.00	True-up cost $0.00	True-up cost $0.00	True-up cost $0.00
Over-licensed amount $60K	Over-licensed amount $1.07K	Over-licensed amount $0.00	Over-licensed amount $0.00
Potential savings $0.00	Potential savings $0.00	Potential savings $0.00	Potential savings $0.00
IBM ● 7% compliant	**IDM Computer S...** ● 0% compliant	**LogRhythm** ● 100% compliant	**Microsoft** ● 0% compliant
Compliant products 1/14	Compliant products 0/2	Compliant products 1/1	Compliant products 0/27
True-up cost $0.00	True-up cost $0.00	True-up cost $0.00	True-up cost $51.94K
Over-licensed amount $43K	Over-licensed amount $0.00	Over-licensed amount $0.00	Over-licensed amount $3.89M
Potential savings $0.00	Potential savings $0.00	Potential savings $0.00	Potential savings $16.85K
Oracle ● 33% compliant	**QlikTech** ● 0% compliant	**SAP** ● 35% compliant	**Splunk** ● 100% compliant
Compliant products 1/3	Compliant products 0/1	Compliant products 6/17	Compliant products 1/1
True-up cost $561.23K	True-up cost $11.28K	True-up cost $0.00	True-up cost $0.00
Over-licensed amount $5.21M	Over-licensed amount $0.00	Over-licensed amount $0.00	Over-licensed amount $56.72K
Potential savings $0.00	Potential savings $0.00	Potential savings $0.00	Potential savings $0.00

Note: *Your values may differ from the screenshot, depending upon when you run the lab.*

Knowledge Check: *Refer to the Answer Guide at lab's end.*

2. Are Adobe Systems and Microsoft two of the listed publishers?

3. Filter the publishers to show those that are not compliant.
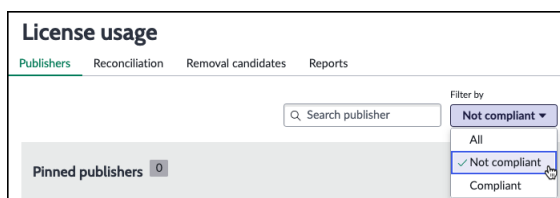
License usage	Details	+

No content to display

Unpinned publishers 14

Adobe... ● 61% compliant		Autode... ● 0% compliant		Citrix S... ● 0% compliant		ej-tech... ● 0% compliant		ESRI ● 0% compliant	
Compliant products	11/18	Compliant products	0/3	Compliant products	0/2	Compliant products	0/1	Compliant products	0/2
True-up cost	$3.53K	True-up cost	$0.00	True-up cost	$0.00	True-up cost	$0.00	True-up cost	$0.00
Over-licensed amount	$1.59M	Over-licensed amount	$0.00	Over-licensed amount	$0.00	Over-licensed amount	$0.00	Over-licensed amount	$0.00
Potential savings	$22.35K	Potential savings	$0.00	Potential savings	$0.00	Potential savings	$0.00	Potential savings	$0.00

IBM ● 7% compliant		IDM Co... ● 0% compliant		Microso... ● 0% compliant		Oracle ● 33% compliant		QlikTech ● 0% compliant	
Compliant products	1/14	Compliant products	0/2	Compliant products	0/27	Compliant products	1/3	Compliant products	0/1
True-up cost	$0.00	True-up cost	$0.00	True-up cost	$51.94K	True-up cost	$561.23K	True-up cost	$11.28K
Over-licensed amount	$43K	Over-licensed amount	$0.00	Over-licensed amount	$3.89M	Over-licensed amount	$5.21M	Over-licensed amount	$0.00
Potential savings	$0.00	Potential savings	$0.00	Potential savings	$16.85K	Potential savings	$0.00	Potential savings	$0.00

SAP ● 35% compliant		Sublim... ● 0% compliant		TechS... ● 0% compliant		VMwar... ● 0% compliant	
Compliant products	6/17	Compliant products	0/1	Compliant products	0/1	Compliant products	0/3
True-up cost	$0.00	True-up cost	$0.00	True-up cost	$0.00	True-up cost	$0.00
Over-licensed amount	$0.00	Over-licensed amount	$0.00	Over-licensed amount	$0.00	Over-licensed amount	$0.00
Potential savings	$0.00	Potential savings	$0.00	Potential savings	$0.00	Potential savings	$0.00

Knowledge Check: *Refer to the Answer Guide at lab's end.*

3. Again, are Adobe Systems and Microsoft two of the listed publishers?

Note: *As Rick knows he needs to pay special attention to Adobe Systems and Microsoft, he wants to pin these two publishers to make it easy to locate and monitor them.*

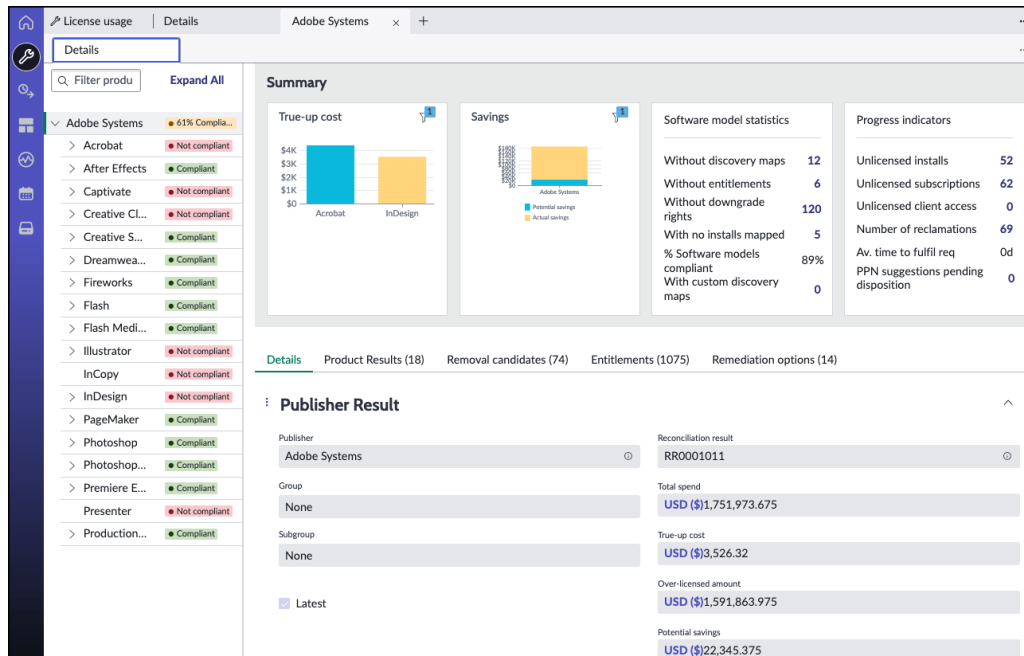4. Hover over the **Adobe Systems** Card and click the **push pin**.
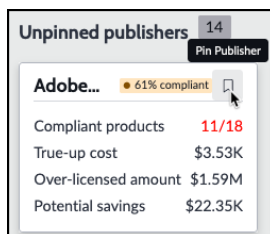
5. Pin the **Microsoft** card as well.

6. Adobe Systems and Microsoft now show up in the **Pinned publishers** section of the view.

Section 3 View product, model, and license metric results

Rick wants to review Adobe reconciliation results.

1. Click the **Adobe Systems** card to view the publisher details page.

> **Note:** *Again, your values may differ from those shown here depending on when you ran the lab.*

2. From the Adobe System navigation tree, click **Illustrator**.

> **Note:** *Notice how the versions of Illustrator are displayed in the tree when Illustrator was clicked.*
>
> **Knowledge Check:** *Refer to the Answer Guide at lab's end.*
>
> *4. What is the product status of Adobe Systems Illustrator? Why?*
>
> *5. What does the over-licensed amount for the product indicate?*
>
> **Knowledge Check:** *Refer to the Answer Guide at lab's end.*
>
> *6. How many Software Model Results are identified?*

3. From the navigation tree, click the Not compliant **CC** software model to open the Software Model Results form.

4. Click the Entitlements (1) tab to view the software entitlements.

Knowledge Check: *Refer to the Answer Guide at lab's end.*

7. How many unlicensed installs are there for this software model?

8. How many license metrics are associated to this software model?

9. How many total license rights are owned?

10. How many total license rights are used?

11 How many total license rights are available?

12. What actions should you take to improve the management of this software model?

STRY030302 – Run reconciliation with modified license metrics

Section 4 View Microsoft results

1. As **Rick Lemm**, navigate to **Software Asset Workspace > License usage**.

2. Look at Microsoft in the **Pinned publishers** and view usage details.

   Knowledge Check: *Refer to the Answer Guide at lab's end.*

   13. What is the true-up cost for Microsoft?

3. Open the **Microsoft** details page.

   Knowledge Check: *Refer to the Answer Guide at lab's end.*

   14. How many non-compliant products for Microsoft have been identified?

4. From the navigation tree, open **Microsoft Project**.

   Note: *The results may vary in your instance.*

   Knowledge Check: *Refer to the Answer Guide at lab's end.*

   15. What is the true-up cost for Microsoft Project?

   16. How many unlicensed installs are there?

   17. Which model or models are causing the non-compliance of Microsoft Project?

5. From the navigation tree, open **2016 Professional Windows.**

Section 5 Set entitlement license metric to Per User

Microsoft Project 2016 Professional Windows currently has an entitlement with a license metric of Per Device. To get a better understanding of whether changing the license metric would improve the compliance position, Rick modifies the license metric on the entitlement.

1. As **Rick Lemm**, navigate to **Software Asset Workspace > Licensing operations** then click on **Software models** under Licensing**.**

2. Open the **Microsoft Project 2016 Professional** software model that has a Software Entitlement assigned.

3. On the Software Entitlements tab click **ET10051 - Microsoft Project 2016 Professional** to open the entitlement record.

4. Change the License metric to **Per User**.

5. Click **Save**.

6. Navigate to **License usage** and click **Run Reconciliation**.

7. From the popup, under Publishers select **Microsoft**.

8. Click **Run reconciliation**.

9. In the Reconciliation Results window, click the **Refresh List** button until the latest reconciliation is shown and has a Status of **Completed**.

10. Navigate back to **Publishers** tab and under Pinned publishers open **Microsoft**.

11. In the navigation tree, expand Project then open the Compliant **2016 Professional** record.

Note: *The results may vary in your instance.*

STRY030303 – Run reconciliation grouped by country

Section 6 Group a reconciliation

Software is often specific to a country or licensed by departments. By default, reconciliation results show compliance based on all owned rights and all used rights. A company may be compliant for one grouping but not another. To further understand the impact, Rick wants to group Microsoft software licenses to determine what the compliance position is by country.

1. As **Rick Lemm**, navigate to **Software Asset Workspace > License usage.**

2. Click **Run Reconciliation**.

3. Populate the popup as follows:
   - Publishers: **Microsoft**
   - Group: **Country**

4. Click **Run reconciliation**.

> **Note:** *Please be patient. This reconciliation may take longer than the previous reconciliation to run due to the additional data dimension.*

5. When the reconciliation result has completed, navigate to **Microsoft Project** on the License usage **Publishers** tab.

6. Click on **Project** in the navigation tree.

> **Knowledge Check:** *Refer to the Answer Guide at lab's end.*
>
> *24. What is the reconciliation status and true-up cost for Country: Any?* **Challenge:** *Why?*
>
> **Note:** *The results in your instance may vary.*

Congratulations! You have completed this lab!

You are now ready to begin learning about other processes that integrate with and are important to Software Asset Management.

Knowledge Check Answer Guide

1. **Why does Rick Lemm, the software asset manager, need to perform this task instead of his software asset analyst, Remy Dashun?**

    - The Run Reconciliation capability requires the sam_admin role. Remy was only granted the sam_user role.

2. **Are Adobe Systems and Microsoft two of the listed publishers?**

    - Yes

3. **Again, are Adobe Systems and Microsoft two of the listed publishers?**

    - Yes

4. **What is the product status of Adobe Systems Illustrator? Why?**

    - Not Compliant
    - True-up costs are identified.

5. **What does the over-licensed amount for the product indicate?**

    - There are software entitlements with license rights not in use.

6. **How many Software Model Results are identified?**

    - 8

7. **How many unlicensed installs are there for this software model?**

    - 4

8. **How many license metrics are associated to this software model?**

    - 1 (User Subscription)

9. **How many total license rights are owned?**

    - 20

10. **How many total license rights are used?**

    - 20

11. **How many total license rights are available?**

    - 0 User Subscriptions

12. W**hat actions should you take to improve the management of this software model?**

    - Allocate the licenses that are in use but are currently unallocated or remove the unallocated installs if they shouldn't be assigned to the users or devices that are using them.

13. **What is the true-up cost for Microsoft?**

    - ~$102k

14. **How many non-compliant products for Microsoft have been identified?**

    - 19

15. **What is the true-up cost for Microsoft Project?**

    - ~$44,000

16. **How many unlicensed installs are there?**

    - 60

17. **Which model or models are causing the non-compliance of Microsoft Project?**

    - Microsoft Project 2016 Professional Windows, Microsoft Project 2013 Professional Windows

18. **What license metrics are identified on the Microsoft Project 2016 Professional Windows product model?**

    - Per Device

19. **How many unlicensed installs are there now?**

    - 0

20. **What is the true-up cost?**

    - $0.00

21. **What license metric was used to count Microsoft Project 2016 Professional Windows?**

    - Per User

22. **Why are the unlicensed installs for the Per User license metric less than the Per Device license metric?**

    - When counting Per device – each device that has an installation of the software license is counted.

    - When counting Per User – some users have licenses on more than one device, so the license would only be counted one time for that user regardless of how many devices he had it running on.

23. **Why are there still remediation options listed for Microsoft Project 2016 Professional Windows?**

    - Because although you have 100 rights available, none of them have been allocated to the 100 users that have the product installed.

    -

24. **What is the reconciliation status and true-up cost for Country: Any? Challenge: Why?**

- Country: Any – Not Compliant, True-up cost of $0.

- Because True-up cost is calculated as an average cost of all entitlements for a given country. Since there are no entitlements for the countries in which the unlicensed software is installed, the average is $0.0 even though there are 45 unlicensed installs.

Lab takeaways

- What product and model results drive compliant/not compliant?

- Why does changing the license metric change the product and model compliance results?

- What is the value of grouping when running a reconciliation?