Import software entitlement data

Lab 2.1 10-15 minute

Lab objectives

You will achieve the following objectives:

- Outdated software model deleted.
- Software entitlements imported.
- Software entitlement import errors resolved.
- Outdated software entitlements are retired.

Lab Dependency: Requires the completion of Lab 1.1

Required Resources: 2.1-entitlement_import_file.xlsx

Scenario

Rick Lemm, Software Asset Manager at Cloud Dimensions, Ltd. (CloudD) has been informed by his ServiceNow administrator, Jet Blake, that the Software Asset Management application is ready for use and that the latest software entitlements for Adobe have been exported into the entitlement import template.

To prepare for operations, Rick wants to import the software entitlements in ServiceNow and resolve any resultant entitlement import errors.

Requirements Summary

User Stories

STRY020101 – Delete outdated software models

As a software asset manager, I need to delete an outdated software model prior to importing my entitlements so it does not cause issues with duplicate software models.

STRY020102 – Import software entitlements

As a software asset manager, I need to import the 2.1-entitlement_import_file, so that Adobe software entitlements can be effectively managed.

• STRY020103 – Resolve entitlement import errors

As a software asset manager, I need to review and clear entitlement import errors, so that all required Adobe software entitlements are created in ServiceNow.

STRY020104 – Retire outdated software entitlements

As a software asset manager, I need to retire three outdated software entitlements prior to reconciling my data so they do not impact my compliance status.

STRY020101 - Delete outdated software models

Section 1 Cleanup outdated software models

Before Rick imports his entitlements, they have an outdated software model that they need to delete so it does not cause issues with his entitlement import.



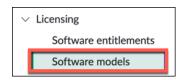
Important: Do not skip this section. If you do so, you may see unexpected entitlement import errors.

- 1. Impersonate Rick Lemm.
- 2. Navigate to Software Asset > Software Asset Workspace.

3. Click License operations.



4. Under Licensing, click Software models.



5. Filter for software models whose **Display names** contain the string **Creative Cloud**, then click **Apply**.



6. Find the record, (there will be a few to look through), with the Display name **Adobe Systems Creative Cloud** that has no Software Entitlements associated with it by opening the records and inspecting the Software Entitlements tab.

Note: When a software entitlement exists, the tab label will show the number of entitlements within brackets.

7. Once you have identified the record with no software entitlements, **delete** the record.



8. When the Confirmation pop-up displays, click **Ok**.

STRY020102 – Import software entitlements

Section 2 Import Excel file

Rick retrieved the supporting files (e.g., the entitlement import file) out of the knowledge base during the Module 1 lab. He is now ready to review and load the software entitlements into ServiceNow.

- 1. Open the **2.1-entitlement import file.xlsx** file that you saved in the previous section.
- 2. Perform a quick review of the data in the file.

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

- 1. How many entitlements are in the file?
- 2. What editions are identified?
- 3. What platforms are identified?
- 4. What agreement types are identified?
- 5. What license types are identified?
- 6. What license metrics are identified?

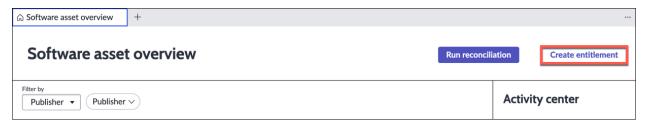
Important: When working with the entitlement import spreadsheet, always compare your existing version of the spreadsheet with the current template

(samp_entitlement_import.xlsx) provided in your ServiceNow instance. The template can be accessed as follows:

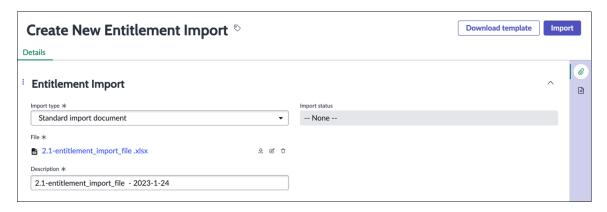
- 3. Navigate to the **Software Asset Workspace**.
- Click Create entitlement.
- 5. Select Import multiple entitlements from an Excel file.
- 6. Click **Next**.
- 7. Click **Download template**.

Important: New fields may be added between versions for enablement of new license types, and you want to ensure you are using the current format of the spreadsheet for your version of ServiceNow.

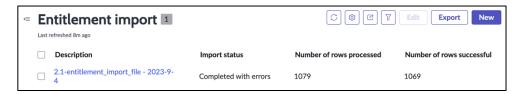
8. As Rick Lemm, navigate to Software Asset Workspace, then click Create entitlement.



- 9. Select Import multiple entitlements from an Excel file, then click Next.
- 10. Use **Attach File** to browse to file **2.1-entitlement_import_file.xlsx** downloaded in the previous lab.



- 11. Click Import.
 - **Note:** Be patient. This upload can take several minutes to complete due to file size.
- 12. When the import is complete, review the import status form that is displayed.



Verify Actions: Verify that the number of entitlements created plus the number of entitlements that could not be processed match the number of entitlement records in the spreadsheet.

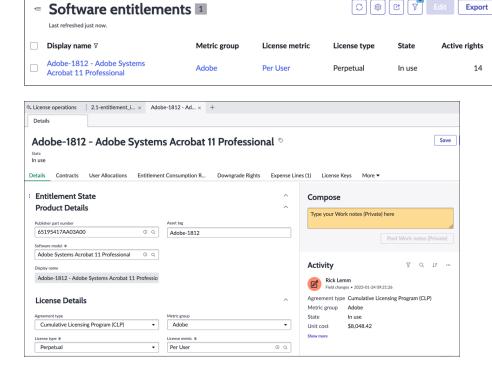
Section 3 Validate successfully imported software entitlements

After importing the entitlements Rick wants to review and verify that they imported as planned.

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



2. Open the record with Display name starting with Adobe-1812.



- 3. If not still open, open the spreadsheet you imported and find the line in the spreadsheet with Asset tag of **Adobe-1812**.
- 4. Compare the data in the spreadsheet to the record in ServiceNow.

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

- 7. Where did the Display name in the Software Entitlement form come from?
- 8. Where did the Software model in the Software Entitlement form come from?

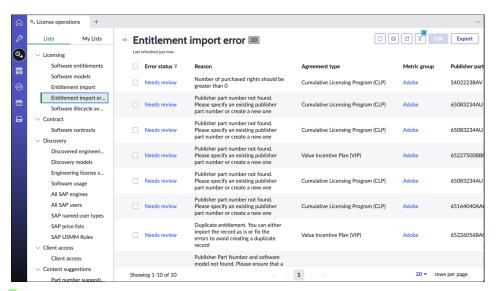
STRY020103 – Resolve entitlement import errors

Section 4 Review and clear errors

Rick needs to review and clear the import errors that were identified when he imported the software entitlements. Until an error is cleared, an entitlement record is not created for it.

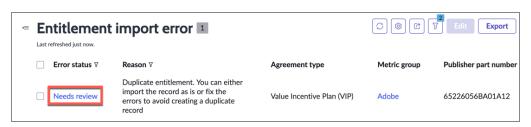


As Rick Lemm, navigate to Software Asset Workspace > License operations > Licensing >
 Entitlement import error.

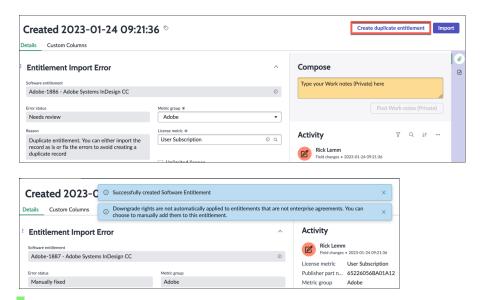


Note: You should see a list of ten Entitlement import errors.

2. Open the record with a Reason of **Duplicate entitlement** by clicking **Needs review** in the Error status column.



- 3. Review the information in the error record. Rick knows this is not a duplicate; two of the same assets were purchased with one Purchased right each.
- 4. Click the **Create duplicate entitlement** button to clear the error.



Note: After the entitlement is created, you will see the message Successfully created Software Entitlement. The duplicate entry record should no longer be in the Entitlement import error list.

5. Click the \mathbf{x} at the top of the tab to close it.

Note: It can be helpful to keep multiple tabs open, for example, when comparing records, but the number of open tabs can quickly grow and become confusing. Close them when they are no longer needed.

- 6. Click the License operations tab to return to the Entitlement import error list.
- 7. Open the record with a Reason of **Number of purchased rights should be 0 or greater**.
- 8. Update the Purchased rights field to 10.

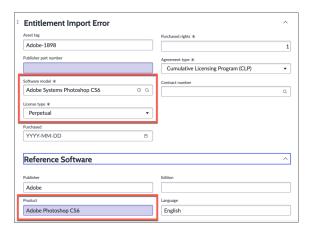


9. Click Import.

10. Validate that the Error status field has been updated to Manually fixed and you see a confirmation message of **Successfully created Software Entitlement**.



- 11. Open the record with a Reason of Please ensure that a Publisher Part Number in the Content Service Library or software model exists for this publisher/product/version/edition/condition.
- 12. Update the Software model field to Adobe Systems Photoshop CS6.
- 13. (If needed) Update the License type to Perpetual.
- 14. Update the Product field in the Reference Software section to **Adobe Photoshop CS6**.



15. Click the **Import** button to create the entitlement and clear the error.



Note: The Error status field should be updated to Manually fixed and you should see the message Successfully created Software Entitlement.

- 16. Navigate back to the Entitlement import error list.
- 17. Open the record with a Publisher part number of 65164040AA03A00.

18. Review the information in the error record. Rick knows that this item should not have been in the spreadsheet that was imported and needs to be deleted.

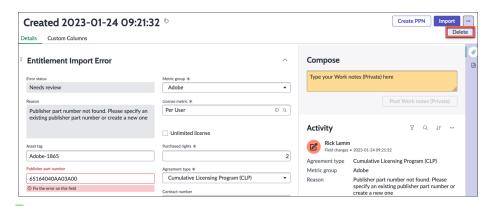
Important: In a real-world situation, your Software Asset Manager should be granted Delete access to the entitlement import table (i.e., samp_entitlement_import) by your ServiceNow administrator which would enable Rick to delete this error. However, the privileges and process to do so are outside the scope of this class.

For expediency during class, we will temporarily impersonate the system administrator, delete this entitlement import error, and then re-impersonate Rick Lemm.

- 19. **End Impersonation** to return to System Administrator.
- 20. Navigate to **Software Asset Workspace > License operations** then click **Entitlement import errors** under Licensing.







Note: When you delete an errant record, the error is deleted, and no entitlement record is created for it.

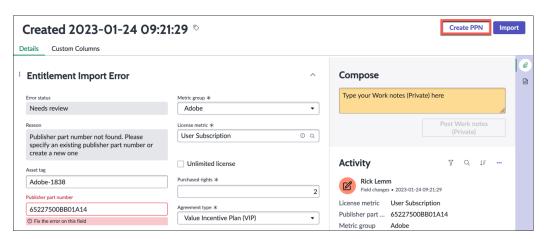
23. Click **OK** in the Confirmation pop-up.

Note: If you do not see a Confirmation pop-up, you may need to change the settings of your browser to allow pop-ups for this ServiceNow instance. Search for instructions for on how to do this for your browser.

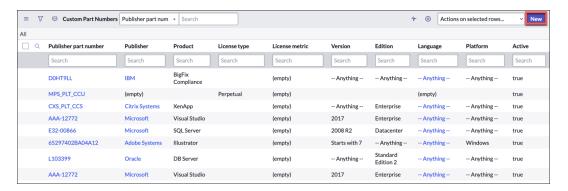
- 24. Impersonate Rick Lemm.
- 25. Navigate to **Software Asset > Software Asset Workspace > License operations** then click **Entitlement import errors** under Licensing.
- 26. Confirm that six errors remain in the Entitlement Import Errors list, each with a Reason of **Publisher Part Number not found**.
- 27. Open the first error with a Publisher part number of 65227500BB01A14.



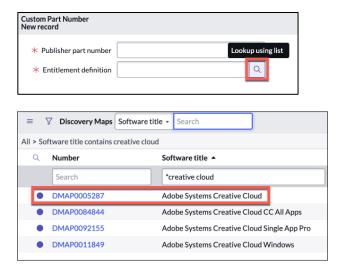
28. Although the Reason is identified as **Publisher Part Number not found**, Rick knows that this is the correct publisher part number for this entitlement. Click the **Create PPN** button.



29. The Custom Part Numbers list view is displayed in a new tab. Click New.



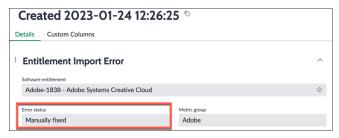
30. Populate the Entitlement definition field by searching for and selecting the Software title **Adobe Systems Creative Cloud**.



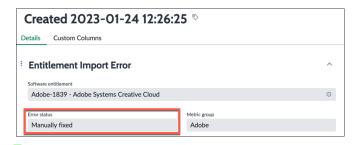
- 31. Populate the remaining fields as follows:
 - Publisher part number: 65227500BB01A14
 - License type: Subscription
 - License metric: User Subscription



- 32. Click the Submit.
- 33. Navigate back to the Entitlement import error list and open the first error with a Publisher part number of **65227500BB01A14**.



- **Note:** The Error status field automatically updates to Manually fixed.
- 34. Open the next error with the same part number of **65227500BB01A14** and validate the Error status also updated to Manually fixed.



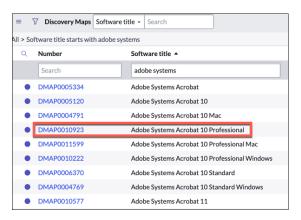
Knowledge Check: Refer to the Answer Guide at lab's end.

- 9. What triggered the automatic creation of the Software Entitlement?
- 35. Navigate back to the Entitlement import error list and click the Refresh List button.

Note: There should be four remaining errors with a Reason of **Publisher Part Number not found**. Rick sees that they all have the same part number of **65083234AU**.

36. **Open** the first record in the list.

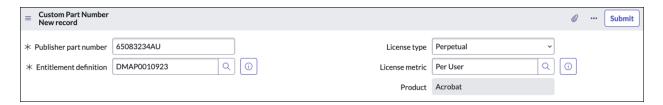
- 37. Again, Rick knows that this is the correct publisher part number for this entitlement. Click the **Create PPN** button.
- 38. The Custom Part Numbers list view is displayed in a new tab. Click **New**.
- 39. Populate the Entitlement definition field by searching for and selecting the Software title Adobe Systems Acrobat 10 Professional



40. Populate the remaining fields as follows:

Publisher part number: 65083234AU

License type: PerpetualLicense metric: Per User



- 41. Click the Submit.
- 42. Navigate back to the Entitlement import error list and open the first error with a Publisher part number of **65083234AU**. Validate that the Error status is set to **Manually fixed**.
- 43. Open the final three error records and check that the Error status is set to Manually fixed.
- 44. Navigate back to the Entitlement import error list and click the **Refresh List** button. Validate that all errors in the Entitlement import errors list have been resolved.



STRY020104 - Retire outdated software entitlements

Section 5 Cleanup outdated software entitlements

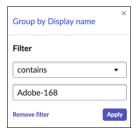
After importing his entitlements, Rick finds that he has three outdated software entitlements that they need to retire so they do not inaccurately impact their reconciliation results later.



Important: Do not skip this section. If you do so, you may see unexpected reconciliation results in the Module 4 labs.

Section 5.1 Retire three outdated software models:

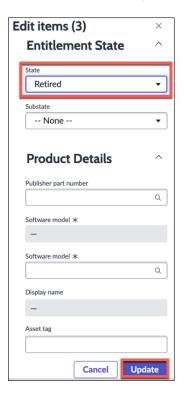
- As Rick Lemm, navigate to Software Asset Workspace > License operations then click Software Entitlements under Licensing.
- 2. Search for the software entitlements whose Display name contain the string **Adobe-168** then click **Apply**.



- 3. Select the following three records by clicking the **check box** next to the Display name.
 - Adobe-1683 Adobe Systems Acrobat DC Windows
 - Adobe-1684 Adobe Systems Acrobat DC Windows
 - Adobe-1685 Adobe Systems Acrobat DC Windows
- 4. Click Edit (3).



5. In the Edit items form, set the State value to **Retired**, then click on **Update**.



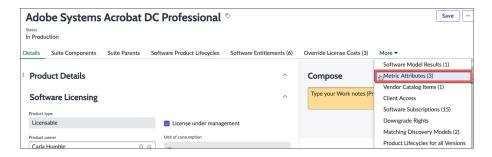
Section 5.2 Update license metrics on one software model:

Rick also knows they have to update the license metrics on one of their new entitlements to allow unlimited installs per right so it accurately reflects in their later reconciliation results.

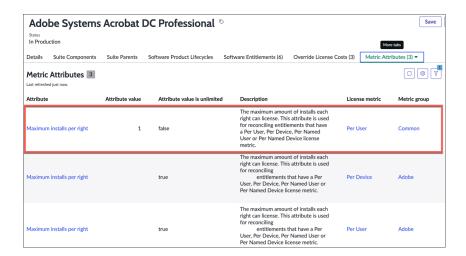
 Navigate to Software Asset Workspace > License operations then click Software models under Licensing.



- 2. Open the software model for Adobe Systems Acrobat DC Professional.
- 3. Click on the More banner and then Metric Attributes.



4. Open the metric attribute with the metric group of **Common**, by clicking the Attribute name.



5. Select the Attribute value is unlimited check box.

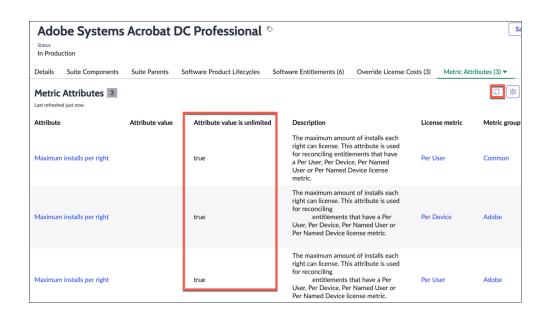


Note: Notice that the value 1 is cleared from the Attribute value field when you select the check box.

6. Click Save.

Note: When you return to the software model form for Adobe Systems Acrobat DC Professional, you will notice that all three metric attributes are now unlimited = true.

- 7. Navigate back to the Detail tab to view the Adobe Systems Acrobat DC Professional Metric Attributes.
- 8. Click the **Refresh List** button and validate that all three metric attributes are now **unlimited = true**.



Congratulations! You have completed this lab!

You are now ready to begin learning about installation data that supports ServiceNow's Software Asset Management Professional product.

Knowledge Check Answer Guide

1. How many entitlements are in the file?

• 1,079

2. What editions are identified?

- Premium
- Professional
- Standard

3. What platforms are identified?

- Linux
- MAC
- Windows

4. What agreement types are identified?

- Cumulative Licensing Program (CLP)
- Generic
- Transactional Licensing Program (TLP)
- Value Incentive Plan (VIP)

5. What license types are identified?

- Perpetual
- Subscription

6. What license metrics are identified?

- Per Device
- Per User
- User Subscription

7. Where did the display name in the Software Entitlement form come from?

Auto created based on asset tag and software model

8. Where did the Software model in the Software Entitlement form come from?

• The publisher part number automatically populated the software model.

9. What triggered the automatic creation of the Software Entitlement?

In the previous step, you created a new publisher part number and mapped it to an
Entitlement definition (discovery map). As this record has the same publisher part
number, the after-import validation identified that the publisher part number now
exists.

Lab takeaways



- How were entitlement display names created?
- What is the value of using publisher part numbers?
- How might entitlement import errors be minimized?