Manage software entitlements and allocations

Lab 3.2   10-15 minute

Lab objectives

You will achieve the following objectives:

- Common license metric software entitlement created
- Publisher license metric software entitlement created
- Software allocation created for a software entitlement

> **Lab Dependency:** *Requires the completion of Labs 1.1 and 3.1*
>
> **Required Resources:** *None*

Scenario

Remy Dashun, Software Asset Administrator at Cloud Dimensions, Ltd. (CloudD), has been requested by the software asset manager to setup software entitlements for two software models.

Remy also found an invalid software entitlement that needs to be deleted. Since Rick, as the Software Asset Manager, manages the CloudD entitlements, they ask Rick to delete it.

Requirements Summary

User Stories

- STRY030201 – Create a common license metric entitlement

  As a software asset administrator, I need to create a new software entitlement for five user licenses of 3D Holo-Team Meeting (HTM), so that I can track and manage usage rights.

- STRY030202 – Create a publisher license metric entitlement

As a software asset administrator, I need to create a new software entitlement for 25 user subscription licenses of Adobe Systems Creative Cloud, so that I can track and manage usage rights.

- STRY030203 – Delete an invalid entitlement

As a software asset manager, I need to delete an invalid software entitlement record for Microsoft Project 2016 Professional so that we can correctly track and manage usage rights.

STRY030201 – Create a common license metric entitlement

Section 1 Create an entitlement for 3D Holo-Team Meeting (HTM)

Remy has been informed by Rick Lemm, Software Asset Manager at CloudD, that a software model has been set up for 3D Holo-Team Meeting (HTM). Remy now needs to create an entitlement for the initial five user licenses being granted.

1. Impersonate **Remy Dashun**.

2. Navigate to **Software Asset Workspace > License operations** then click on **Software entitlements** under Licensing.

3. Click **New**.

4. Select **Fill out the details in a standard form** on the Create new entitlement popup.

5. Click **Next**.

6. Complete the form as follows:
   - Asset tag: **SAM00921**
   - Software model: **Cloud Dimensions, Ltd. 3D Holo-Team Meeting (HTM) 2.0**

   > **Knowledge Check:** *Refer to the Answer Guide at lab's end.*
   >
   > *1. What field was updated when you selected the software model? Where did this come from? What is the value in the Total cost field?*

- Metric group: **Common**
- License metric: **Per User**
- Purchased rights: **5**

- Unit cost: **$12,000**

Note: *The **Unit cost** is lower than what we set in Lab 3.1; this is intentional.*

7. Click **Save.**

8. Click **Publish**.

SAM00921 – Cloud Dimensions, Ltd. 3D Holo-Team Meeting (HTM) 2.0

State
In use

| Details | Contracts | User Allocations | Entitlement Consumption R... | Downgrade Rights | Expense Lines | License Keys | Entitle |

License Details   ∧

Agreement type
Generic

Metric group
Common

License type ✶
Perpetual

License metric ✶
Per User   ⓘ 🔍

☐ Unlimited license

Rights Purchased   ∧

Purchased rights ✶
5

Active rights
5

Unit cost
USD ($) ▾ 12,000.00

Total cost
USD ($)60,000.00

Compose

Type your Work

Activity

Remy Das
Field change
State In use was

Remy Das
Field change
State

STRY030202 – Create publisher license metric entitlement

Section 2 Create an entitlement for Adobe Systems Creative Cloud

Remy has been informed by Rick Lemm, Software Asset Manager at CloudD, that 25 additional user subscriptions have been purchased and need to be tracked.

1. As **Remy Dashun**, navigate to **Software Asset Workspace > License operations** then click on **Software entitlements** under Licensing.

2. Click **New**.

3. In the popup dialog select **Fill out the details in a standard form**, then click **Next**.

4. Complete the **Asset tag** and **Publisher part number** as follows:

   - Asset tag: **SAM90002**
   - Publisher part number: **65206810BA01A12**

   Hint: *Rather than typing the entire number, use the magnifying glass to the right of the field to search for the Software title **Creative Cloud** or begin typing the number to narrow your list of available options.*

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

   6. Where did the publisher part number come from?

   7. What happened when you entered the publisher part number?

5. Leave the Software model and Metric group fields with the automatically filled values.

6. Update the following fields as follows:

   - License type: **Subscription**
   - License metric: **Per Device**
   - Purchased rights: **25**
   - Unit Cost: **$325**

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

   8. What happened when you changed the License type field from Perpetual to Subscription?

- Start date: **<first day of this month>**

- End date: **<first day of this month next year>**

7. Click **Save**.

8. Click **Publish**.

Section 3 Allocate an Adobe Systems Creative Cloud software license

Software rights can be allocated to devices or users, dependent on the License metric selected. Remy must allocate one of the available entitlement rights for Adobe Systems Creative Cloud.

1. As **Remy Dashun** reopen the entitlement record from the last step.

   Hint: *The tabs at the top of the Workspace allow for easy navigation between open forms and lists.*

2. On the **Device Allocations** tab of the Adobe Systems Creative Cloud entitlement record that was just created, click **New**.

3. In the Allocated to field, start typing **Amelia Caputo**.

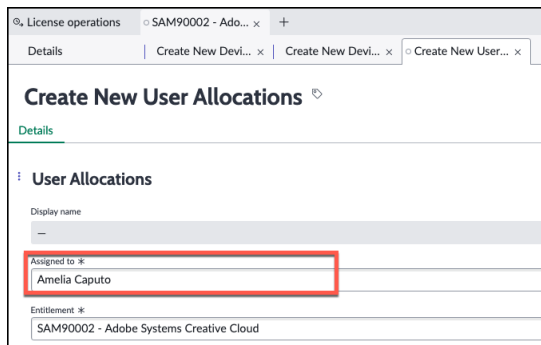> **Knowledge Check:** *Refer to the Answer Guide at lab's end.*
>
> *9. Why doesn't the pick list display?*

4. Navigate back to the **Details** tab.

5. Change the License metric to **User Subscription**.

6. Click **Save**.

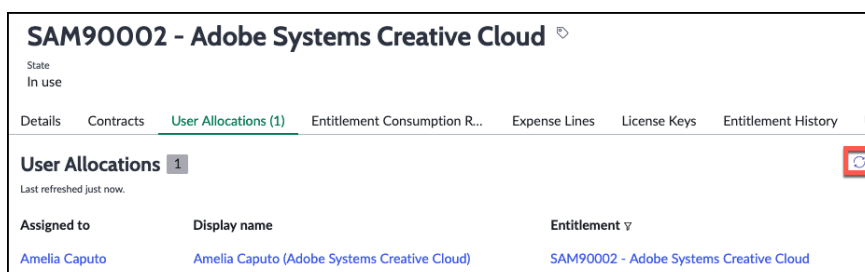> **Knowledge Check:** *Refer to the Answer Guide at lab's end.*
>
> *10. What happened to the Device Allocations tab? Why?*

7. Navigate to the **User Allocations** tab.

8. Click **New**.

9. In the Assigned to field, type **Amelia Caputo**.

10. Click **Save**.

11. Navigate back to the Details tab.

12. **Refresh** the User Allocations list.

> **Knowledge Check:** *Refer to the Answer Guide at lab's end.*
>
> *11. What happened to the Allocations available field when you saved the record?*

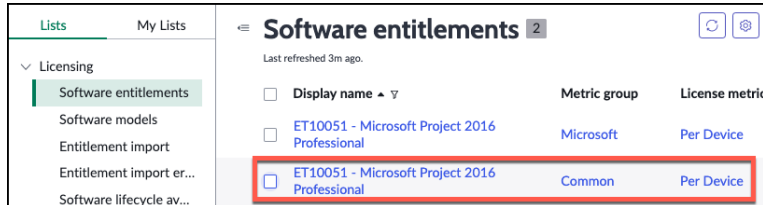## STRY030203 – Delete an invalid entitlement

Section 4 Delete an invalid entitlement

During her daily administration activities, Remy found an invalid entitlement that must be deleted. Remy notified Rick Lemm, Software Asset Manager at CloudD, who now must delete it.

1. Impersonate **Rick Lemm.**

2. Navigate to **Software Asset Workspace > License operations** then click on **Software entitlements**.

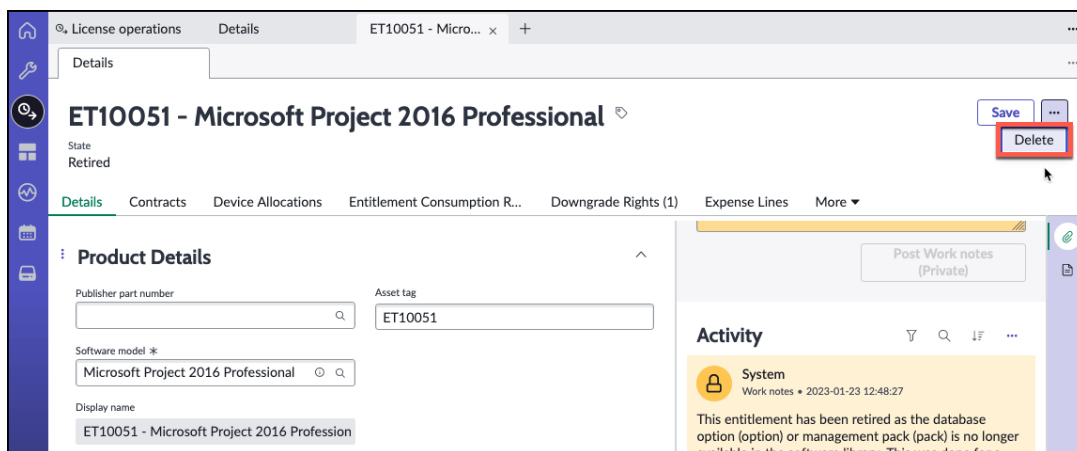3. Find the software entitlements for **Microsoft Project 2016**.

4. Open the entitlement **ET10051 – Microsoft Project 2016 Professional** with a Metric group of **Common**

5. Click the More actions menu item and select **Delete**.

6. When the Confirmation pop-up displays, click **Delete**.

Congratulations! You have completed this lab!

You are now ready to begin learning about software reconciliation.

Knowledge Check Answer Guide

1. **What field was updated when you selected the software model? Where did this come from? What is the value in the Total cost field?**
   - Unit cost was updated to $15,000.
   - The unit cost was updated based on the cost identified on the software model selected.
   - $0

2. **What field was updated when you set Purchased rights to 5? Why?**

   - Total cost was updated to $75,000

   - Automatically calculated based on the $15,000 Unit cost multiplied by the five purchased rights.

3. **What is the value in the Total cost field after the Unit cost was updated? Why?**

   - $60,000

   - Total cost was recalculated based on the updated unit cost of the entitlements multiplied by the 5 purchased rights.

4. **What is the entitlement display name? Why?**

   - SAM00921 - Cloud Dimensions, Ltd. 3D Holo-Team Meeting (HTM) 2.0

   - Unique display name based on asset tag and software model

5. **What happened to Active rights and Allocations available fields when you saved the record?**

   - Active rights and Allocations available fields updated to the same number as Purchased rights field.

6. **Where did the publisher part number come from?**

   - ServiceNow's content service

7. **What happened when you entered the publisher part number?**

   - Software model automatically populated

   - Metric group updated from Common to Adobe.

8. **What happened when you changed the License duration from Perpetual to Subscription?**

   - Two new fields appear to enter start and end dates of the subscription license.

9. **Why doesn't the pick list display?**

   - Because the entitlement has a license metric of per device, so a device would need to be entered in the field.

10. **What happened to the Device Allocations tab? Why?**

    - It has been replaced with a User Allocations tab.

    - The updated license metric is user based, not device based.

11. **What happened to the Allocations available field when you saved the record?**

    - Allocations available was reduced by 1.

Lab takeaways

- What is the value of using a publisher part number?

- What other types of information is stored on the entitlement record?

- Why track software allocations?