



License Management

User Manual

Build 2.0

2015-03-09

This is a user manual to perform software license management in SAMLite. This manual outlines the step by step approach in managing software license purchases, authorizing license usage and how you can effectively use this information to manage your software asset in your organization.

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SAMLite License Management Overview

Introduction

License Management is to manage purchase and inventory of software and machines. Users are able to manage purchase, software authority and generate reconciliation reports.

In order to access the pages, users must have following rights:

1) Reporting User

Reporting Users are accessible to Purchase Order, Software Reconciliation and Machine Reconciliation pages. However, they may not add, modify or remove any records from Purchase Order or Authorization pages.

2) License Purchase Moderator

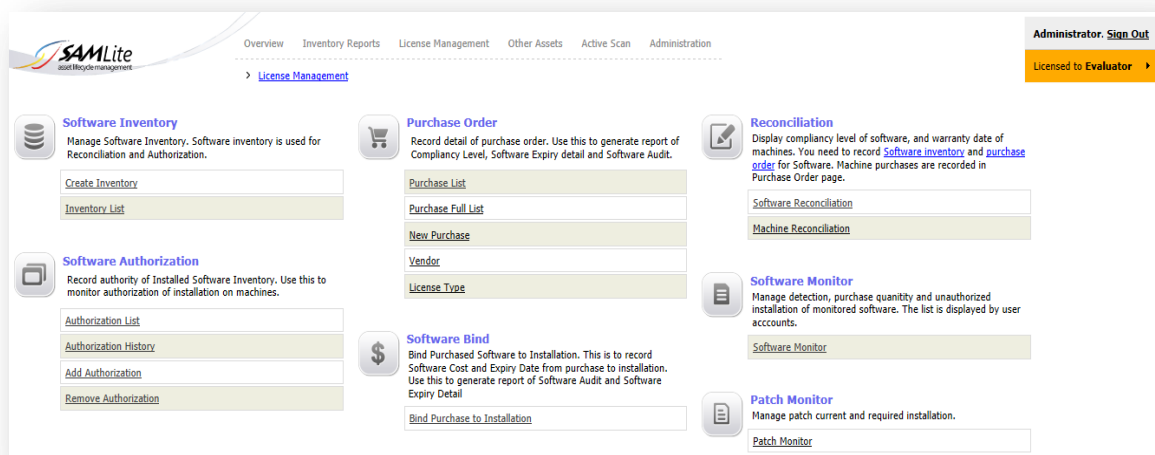
License Purchase Moderators are accessible to Purchase Order, Bind Purchase to Installation, Vendor and License Type page. These users are able to add, modify or remove Purchase Orders, Vendors and License Types.

3) License Authorization Moderator

License Authorization Moderators are users that able to access Authorization pages. These users are able to add or remove authorization of Software Installation.

Note: User rights can be changed at Administration page

License Management Overview



The screenshot displays the SAMLite License Management Overview page. The navigation bar includes: Overview, Inventory Reports, License Management (selected), Other Assets, Active Scan, and Administration. The user is logged in as Administrator and is licensed to an Evaluator. The main content area is organized into six functional sections:

- Software Inventory:** Manage Software Inventory. Software inventory is used for Reconciliation and Authorization. Actions: Create Inventory, Inventory List.
- Software Authorization:** Record authority of Installed Software Inventory. Use this to monitor authorization of installation on machines. Actions: Authorization List, Authorization History, Add Authorization, Remove Authorization.
- Purchase Order:** Record detail of purchase order. Use this to generate report of Compliancy Level, Software Expiry detail and Software Audit. Actions: Purchase List, Purchase Full List, New Purchase, Vendor, License Type.
- Software Bind:** Bind Purchased Software to Installation. This is to record Software Cost and Expiry Date from purchase to installation. Use this to generate report of Software Audit and Software Expiry Detail. Action: Bind Purchase to Installation.
- Reconciliation:** Display compliancy level of software, and warranty date of machines. You need to record Software inventory and purchase order for Software. Machine purchases are recorded in Purchase Order page. Actions: Software Reconciliation, Machine Reconciliation.
- Software Monitor:** Manage detection, purchase quantity and unauthorized installation of monitored software. The list is displayed by user accounts. Action: Software Monitor.
- Patch Monitor:** Manage patch current and required installation. Action: Patch Monitor.

Name	Description
Software Inventory	Group software with common names into a single software inventory. This is very useful in license compliancy management.
Purchase Order	Records Purchase Information. Users may add, modify or remove purchase records in this page. Click Add Purchase Order to insert a purchase order.
Reconciliation	Display software licensing gaps and its compliancy level. Recorded purchases for machines can be seen here.
Software Authorization	Record authority of installed software inventory.
Software Bind	Bind purchased software to installed Software. This is to record the installed Software with purchase information such as Cost and Support Expiry Date. In addition, it is also to identify the purchased software already installed on machines.
Software Monitor	Manage and monitor selected purchased software.
Patch Monitor	Manage and monitor patches and hotfixes installed.

Software Inventory

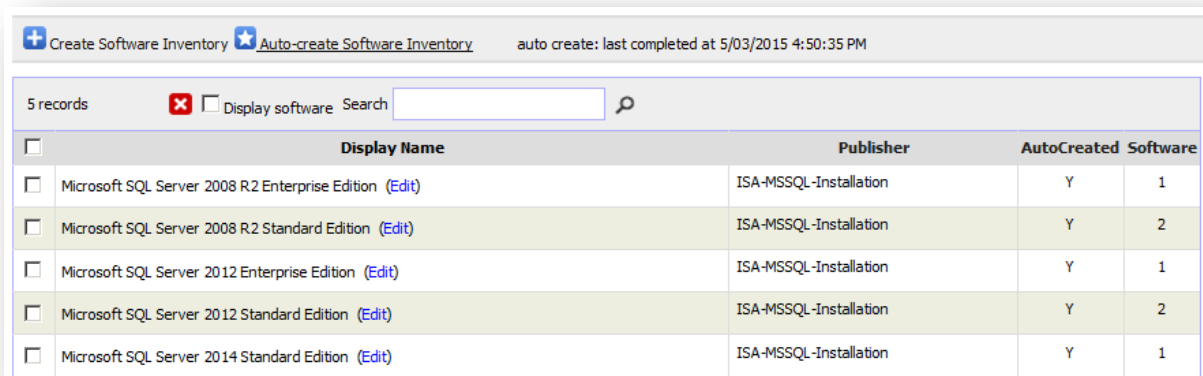
The objective of having this function is to allow user to group software with common names into a single Software Inventory so to manage the license compliancy level easier. For example, SAMLite will capture Microsoft Office Enterprise 2007 with a few different versions, where they are the same software. With Software Inventory, users can group them together. This feature will affect Software Authorization, Purchase Order, Software Reconciliation, Compliancy Level, Software Expiry details and Software Audit.

In this section there are parts to look at:

- Inventory List
- Create Inventory
- Auto-Create Software Inventory

Inventory List

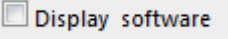

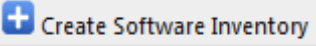
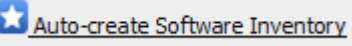

In the **Inventory List** page, user will see a list displayed as below:



<input type="checkbox"/>	Display Name	Publisher	AutoCreated	Software
<input type="checkbox"/>	Microsoft SQL Server 2008 R2 Enterprise Edition (Edit)	ISA-MSSQL-Installation	Y	1
<input type="checkbox"/>	Microsoft SQL Server 2008 R2 Standard Edition (Edit)	ISA-MSSQL-Installation	Y	2
<input type="checkbox"/>	Microsoft SQL Server 2012 Enterprise Edition (Edit)	ISA-MSSQL-Installation	Y	1
<input type="checkbox"/>	Microsoft SQL Server 2012 Standard Edition (Edit)	ISA-MSSQL-Installation	Y	2
<input type="checkbox"/>	Microsoft SQL Server 2014 Standard Edition (Edit)	ISA-MSSQL-Installation	Y	1

Displayed is software that has already been put into group.

Item/Column	Description
Display Name	Name of the software group. Click on the Display Name header will allow user to sort the record by alphabetical order (A-Z) or (Z-A).
Publisher	Name of the software publisher. Click on the Publisher header will allow user to sort the record by alphabetical order (A-Z) or (Z-A).

AutoCreated	Whether the software inventory group was created using the Auto-create Software Inventory feature or not
Software	Displayed the total number of software grouped under this software group. Click on the Software header will allow user to sort the number from largest to smallest or smallest to largest.
	If the box is checked, user will be able to see what are the software and its version parked in the each of the software group.
	Allows user to narrow down the list by typing in the search criteria/keyword in the search box and click on the search button. Search will be done on the Display Name (Software Name), Version, Publisher and Software.
	Click on this icon/link will lead user to page where they can create and group for the common software.
	Click to go to the Auto-Create Software Inventory page where you can create multiple software inventory groups based on software and publish name patterns, license type and software categories.
	Check on the checkbox next to the displayed software name and click on this button will allow user to delete the software group from the list.

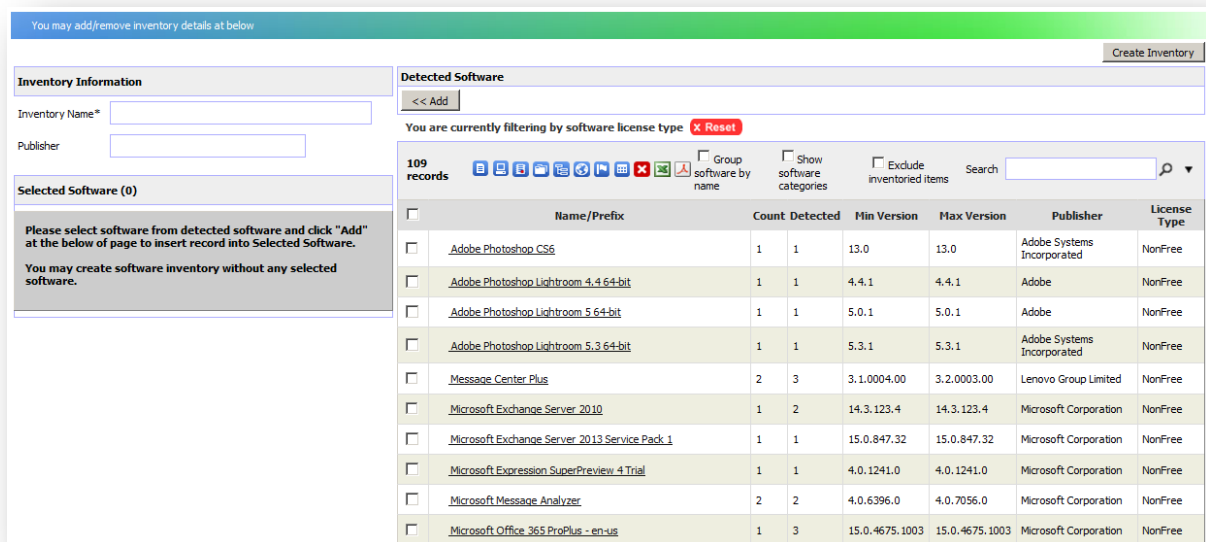
Create Inventory

In the **Create Inventory** page, user can create a software inventory group from the list of software detected in users' machines (Detected Software pane on the right) or create an empty group without any software.

Follow the steps below to create inventory (software group):

1. Go to **License Management** from the top menu. Click on **Create Inventory** from **Software Inventory** section.
2. From the **Detected Software** list, select software to be added to the Software Inventory group. E.g.: **Microsoft Enterprise 2007**.
3. Please note that you will see that the **Inventory Name** is already auto-generated.
4. Click on button to have the selected software populated in the **Selected Software** list (on the left pane).
5. Should you have decided that there are some software you do not want to include in the **Selected Software** list, you may remove by checking the checkbox and click on button.
6. When you have finished adding the software, click on . The Software Inventory will be created and saved.

Below is a screen shot of a Create Software Inventory page followed by a description of some items:



You may add/remove inventory details at below

Inventory Information

Inventory Name*

Publisher

Detected Software

You are currently filtering by software license type

109 records Group software by name Show software categories Exclude inventoried items Search











<input type="checkbox"/>	Name/Prefix	Count	Detected	Min Version	Max Version	Publisher	License Type
<input type="checkbox"/>	Adobe Photoshop CS6	1	1	13.0	13.0	Adobe Systems Incorporated	NonFree
<input type="checkbox"/>	Adobe Photoshop Lightroom 4.4 64-bit	1	1	4.4.1	4.4.1	Adobe	NonFree
<input type="checkbox"/>	Adobe Photoshop Lightroom 5.6 4-bit	1	1	5.0.1	5.0.1	Adobe	NonFree
<input type="checkbox"/>	Adobe Photoshop Lightroom 5.3 64-bit	1	1	5.3.1	5.3.1	Adobe Systems Incorporated	NonFree
<input type="checkbox"/>	Message Center Plus	2	3	3.1.0004.00	3.2.0003.00	Lenovo Group Limited	NonFree
<input type="checkbox"/>	Microsoft Exchange Server 2010	1	2	14.3.123.4	14.3.123.4	Microsoft Corporation	NonFree
<input type="checkbox"/>	Microsoft Exchange Server 2013 Service Pack 1	1	1	15.0.847.32	15.0.847.32	Microsoft Corporation	NonFree
<input type="checkbox"/>	Microsoft Expression SuperPreview 4 Trial	1	1	4.0.1241.0	4.0.1241.0	Microsoft Corporation	NonFree
<input type="checkbox"/>	Microsoft Message Analyzer	2	2	4.0.6396.0	4.0.7056.0	Microsoft Corporation	NonFree
<input type="checkbox"/>	Microsoft Office 365 ProPlus - en-us	1	3	15.0.4675.1003	15.0.4675.1003	Microsoft Corporation	NonFree

Selected Software (0)

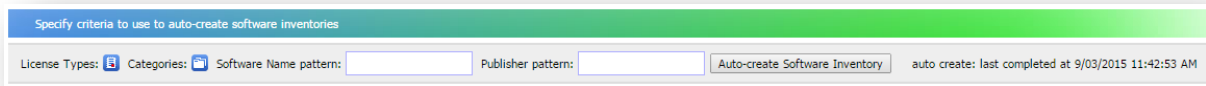
Please select software from detected software and click "Add" at the below of page to insert record into Selected Software.

You may create software inventory without any selected software.

Item/Column	Description
<input data-bbox="199 324 311 358" type="button" value=" << Add "/>	Add selected software to software inventory group
<input data-bbox="199 403 399 436" type="button" value=" Create Inventory "/>	Save and create the software inventory group
Inventory Name* <input data-bbox="335 481 718 526" type="text"/>	Inventory name will be auto-generated in first selection of Detected Software . However, the Inventory Name is edit-able in the box itself.
Publisher <input data-bbox="319 638 606 683" type="text"/>	Where user can insert the name of the Publisher . This field can be left blank.
Name/Prefix	Software name or prefix (first word(s) of software name).
Count	Number of different versions with the name/prefix
Detected	Number of detected machines with the software with that name/prefix
Min Version	Minimum version for name/prefix
Max Version	Maximum version for name/prefix
Publisher	Publisher (blank if name/prefix covers software with different publishers)
License Type	License Type (blank if name/prefix covers software with different license types)
Categories	Software categories (blank if name/prefix covers software with different software categories)
Group software by name	Select to group software by name/words.
Show software categories	Select to show software categories
Exclude inventoried items	Select to exclude software that's already added to a software inventory group.
Search <input data-bbox="279 1758 582 1803" type="text"/> <input data-bbox="590 1758 622 1803" type="button" value=" 🔍 "/>	Search by Name, Publisher and License Type.
<input data-bbox="191 1848 231 1881" type="button" value=" 📄 "/>	Show details of selected software



	Show machines with selected software
	Filter software by software license type
	Filter software by software category
	Filter software by department
	Filter software by location
	Filter software by machine status
	Filter software by first discovered date
	Delete selected software
	Export results to Excel readable format
	Export results to PDF

Auto-Create Software Inventory



The Auto-Create Software Inventory page helps with creating multiple Software Inventory groups based on the software and publisher names, license types and categories.

A Software Inventory group will be created for each unique Software Name for software that matches the Software Name pattern and Publisher pattern, and belongs to the specified software categories and software license type.

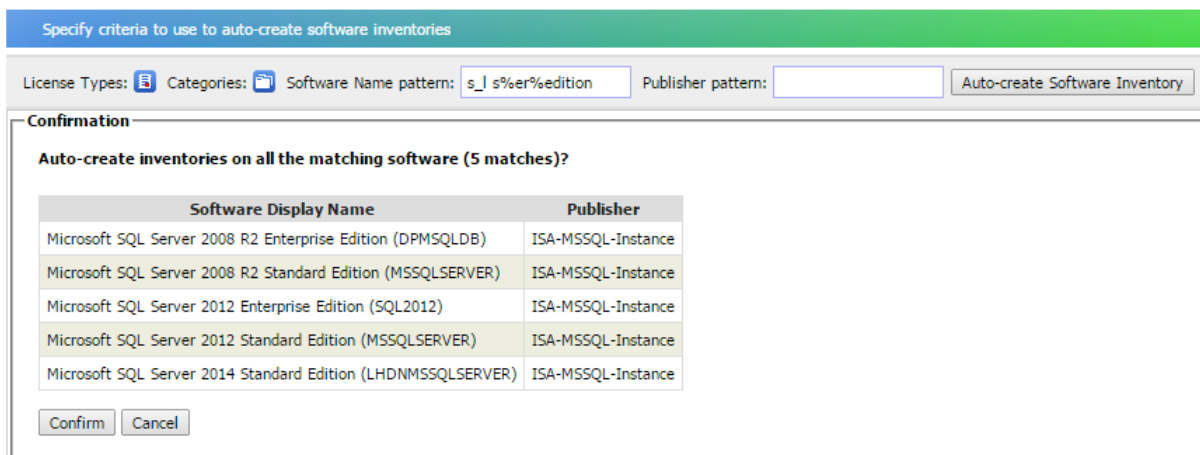
Click on the License Type icon  to restrict the auto-creation to particular license types. The default restriction is to NonFree software only. Click on the Categories icon  to restrict the auto-creation to software belonging to certain categories. By default no categories are selected.

Enter a software name pattern to restrict the creation to only software that matches the pattern.

Enter a publisher pattern to restrict to publisher names that match that pattern.

The pattern matches if it appears as a substring in any part of the name to match. Wildcards like % and _ can be specified in patterns. The % wildcard character matches any string of zero or more characters. The _ wildcard character matches any single character.

After specifying the various constraints click on the Auto-Create Software Inventory button to get a confirmation screen showing a short-list of Software Inventories that would be created:



Software Display Name	Publisher
Microsoft SQL Server 2008 R2 Enterprise Edition (DPMSQLDB)	ISA-MSSQL-Instance
Microsoft SQL Server 2008 R2 Standard Edition (MSSQLSERVER)	ISA-MSSQL-Instance
Microsoft SQL Server 2012 Enterprise Edition (SQL2012)	ISA-MSSQL-Instance
Microsoft SQL Server 2012 Standard Edition (MSSQLSERVER)	ISA-MSSQL-Instance
Microsoft SQL Server 2014 Standard Edition (LHDNMSSQLSERVER)	ISA-MSSQL-Instance

If the list is acceptable, click on Confirm to proceed. Otherwise you can cancel or change the constraints and try again.

If you click on Confirm and the system managed to create all of the software inventory groups in a short time you will see a success message:

[+ Create Software Inventory](#)
[Auto-create Software Inventory](#)
auto create: last completed at 10/03/2015 12:08:59 PM

Software inventories created successfully

10 records Display software 🔍

<input type="checkbox"/>	Display Name	Publisher	AutoCreated	Software
<input type="checkbox"/>	Microsoft SQL Server 2008 R2 Enterprise Edition (Edit)	ISA-MSSQL-Installation	Y	1
<input type="checkbox"/>	Microsoft SQL Server 2008 R2 Enterprise Edition (DPM5QLDB) (Edit)	ISA-MSSQL-Instance	Y	1
<input type="checkbox"/>	Microsoft SQL Server 2008 R2 Standard Edition (Edit)	ISA-MSSQL-Installation	Y	2
<input type="checkbox"/>	Microsoft SQL Server 2008 R2 Standard Edition (MSSQLSERVER) (Edit)	ISA-MSSQL-Instance	Y	3
<input type="checkbox"/>	Microsoft SQL Server 2012 Enterprise Edition (Edit)	ISA-MSSQL-Installation	Y	1
<input type="checkbox"/>	Microsoft SQL Server 2012 Enterprise Edition (SQL2012) (Edit)	ISA-MSSQL-Instance	Y	1
<input type="checkbox"/>	Microsoft SQL Server 2012 Standard Edition (Edit)	ISA-MSSQL-Installation	Y	2
<input type="checkbox"/>	Microsoft SQL Server 2012 Standard Edition (MSSQLSERVER) (Edit)	ISA-MSSQL-Instance	Y	2
<input type="checkbox"/>	Microsoft SQL Server 2014 Standard Edition (Edit)	ISA-MSSQL-Installation	Y	1
<input type="checkbox"/>	Microsoft SQL Server 2014 Standard Edition (LHDNMSSQLSERVER) (Edit)	ISA-MSSQL-Instance	Y	1






If it takes a while to create all the groups you will get the following message “The auto-create software inventory process is still running, please wait...”

You can only have one pending auto-create software inventory task at a time. Trying to submit an auto-create software inventory task while there is already a running task AND a pending auto-create task will overwrite the pending task (the already running task will be unaffected).

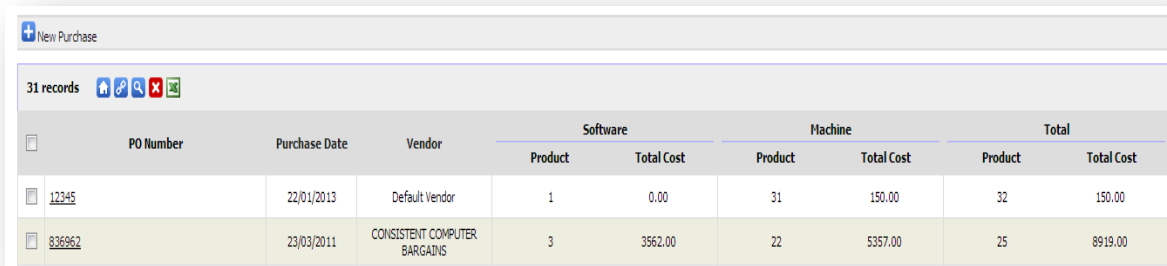
Purchase Order

This is where user records their software and machine purchases. Information such as Software Purchased, License Type, Number of License purchased, Machine Model, Software and Machine Price and etc will be recorded.

In this section, there are 5 parts to look at:

-  Purchase List
-  Purchase Full List
-  New Purchase
-  Vendor
-  License Type

Purchase List



PO Number	Purchase Date	Vendor	Software		Machine		Total	
			Product	Total Cost	Product	Total Cost	Product	Total Cost
12345	22/01/2013	Default Vendor	1	0.00	31	150.00	32	150.00
836962	23/03/2011	CONSISTENT COMPUTER BARGAINING	3	3562.00	22	5357.00	25	8919.00

This page is to display a list of created purchase orders with vendor, products and total price of Software and Machine.


Column	Description
PO Number	Name of Purchase Order.
Purchase Date	Date where the purchase order is recorded.
Vendor	Display vendor name.
Software Product	Number of software products.
Software Price	Total Price for All unit of software.
Machine Product	Number of machine products.
Machine Price	Total Price for All units of Machines.
Total Product	Summation of Total Software Product and Total Machine Product.
Total Price	Total Price of Purchase Order

To see further details of the created purchased order, user should click on the PO Number.

New Purchase

This page is where user creates new purchase order.

Follow steps below to create a new purchase order:

1. Click  [Add Purchase Order](#) to add new purchase order.

Complete form to add new purchase order

Add Purchase Order

PO Detail

PO Number*

Vendor

Date of Issue

Payment due date

Person in charge

Bill To

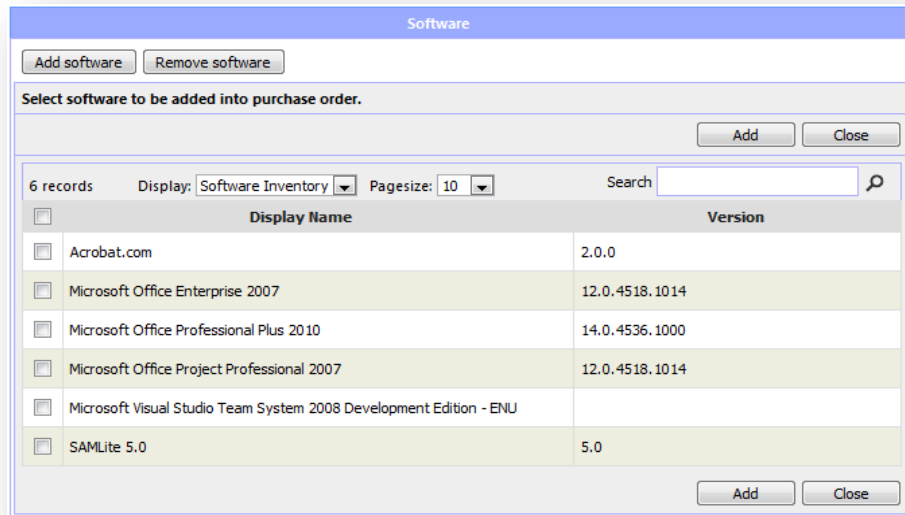
Company Monster Inc

Description

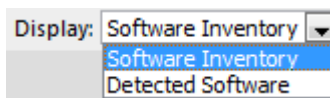
Attachment (max. 4000.0 kb per file)

Field Name	Description
PO Number	Number of the purchase order.
Vendor	Vendor Details of current PO. You may click on the drop down list if you already have a list of vendor created. Else, user must click on <input type="button" value="New Vendor"/> to add new vendor. Complete the fields and click Create to add the vendor.
Date of Issue	Issued date for current PO.
Payment due Date	Payment due date of current purchase order. If the PO has already fully paid, you can set the value as "never". (Simply empty the field to have the value)
Person In charge	Person who handles current PO
Bill To	Location, person or company the being billed. This field can be name, company name or address

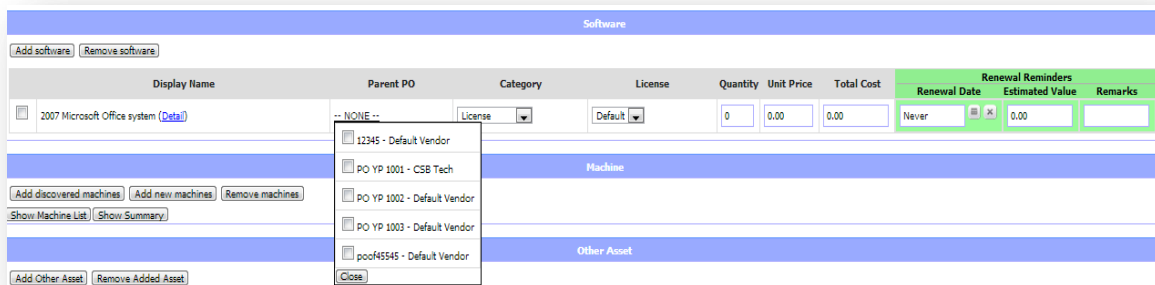
2. To record purchased product for:
 - a. **Software Product**



- Click **Add Software** button.



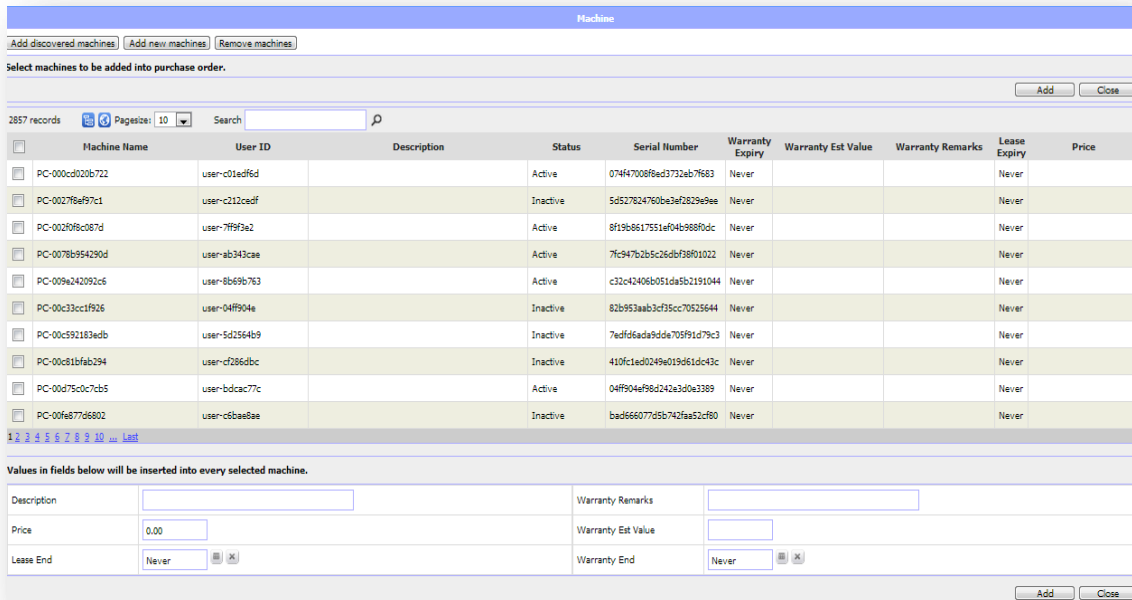
- Select software from the list.
- User may narrow down the list by typing in the search criteria/keyword into search box.
- Select software by checking the checkbox and click on **Add** button.



- You can choose a Parent PO for the software added by clicking on the **-NONE-** and select the PO available. Click close after selecting the parent PO.
- Select the Category and License for the software added. Fill in the quantity and unit price for the software. Fill in the details for renewal if there is any.
- You may remove a software product by selecting the checkboxes and click **Remove Software** button.

b. Machine Products

- Click **Add Discovered Machines** to add any detected machines into purchase list.



Machine

Add discovered machines | Add new machines | Remove machines

Select machines to be added into purchase order. Add Close

2857 records | Page size: 10 | Search:

<input type="checkbox"/>	Machine Name	User ID	Description	Status	Serial Number	Warranty Expiry	Warranty Est Value	Warranty Remarks	Lease Expiry	Price
<input type="checkbox"/>	PC-000cd020b772	user-c01edf6d		Active	074f47008f9ed3732eb7683	Never			Never	
<input type="checkbox"/>	PC-00276ef97c1	user-c212cedf		Inactive	5d5278247610e3af2829e9ee	Never			Never	
<input type="checkbox"/>	PC-002f98c87d	user-7f9f3a2		Active	8f9b8617551ef04b988f0dc	Never			Never	
<input type="checkbox"/>	PC-0078b954290d	user-ab343cae		Active	7fc947b2b5c26dbf3801022	Never			Never	
<input type="checkbox"/>	PC-009a242092c6	user-8b69b763		Active	c32c42406b051da5b2191044	Never			Never	
<input type="checkbox"/>	PC-00c33cc1f926	user-04ff904e		Inactive	82b953aab3cf35cc70525644	Never			Never	
<input type="checkbox"/>	PC-00c592183aedb	user-5d2564b9		Inactive	7edfd6ada9d4e709f91d79c3	Never			Never	
<input type="checkbox"/>	PC-00c81bfab294	user-c786dfbc		Inactive	410f1ed0249e019d61dc43c	Never			Never	
<input type="checkbox"/>	PC-00d75c0c7cb5	user-bdcac77c		Active	04ff904e98d242a3d0a3389	Never			Never	
<input type="checkbox"/>	PC-00fe877d6802	user-c6bae8ae		Inactive	bad666077d5b742fae52c80	Never			Never	

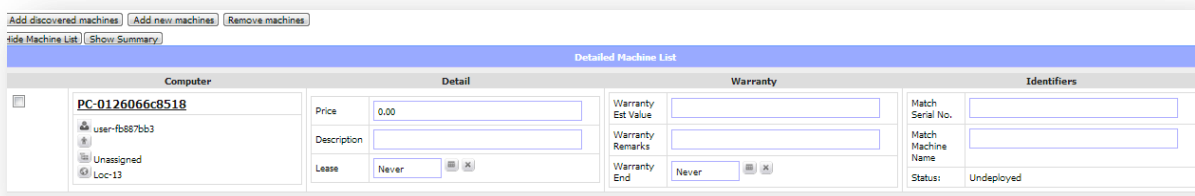
1 2 3 4 5 6 7 8 9 10 ... Last

Values in fields below will be inserted into every selected machine.

Description	<input type="text"/>	Warranty Remarks	<input type="text"/>
Price	0.00	Warranty Est Value	<input type="text"/>
Lease End	Never <input type="button" value="X"/>	Warranty End	Never <input type="button" value="X"/>

Add Close

- Select any machines in the list and click **Add** button at below of the list.
- The machine details will be added into the columns under the list as shown in figure below.
- Add the details of the machines (price and description).
- Add the warranty details into warranty columns if there is any.
- Fill in the identifiers (machine serial number and machine name).



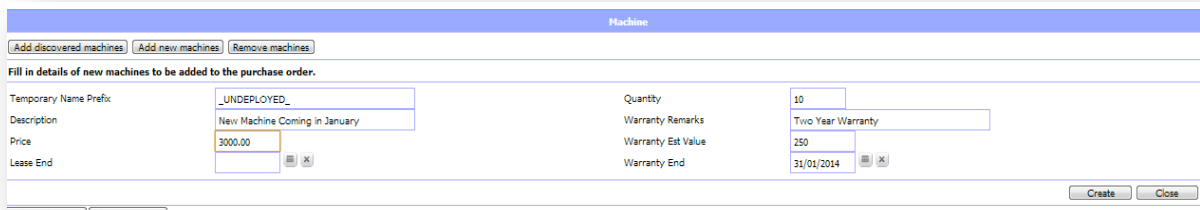
Add discovered machines | Add new machines | Remove machines

side Machine List | Show Summary

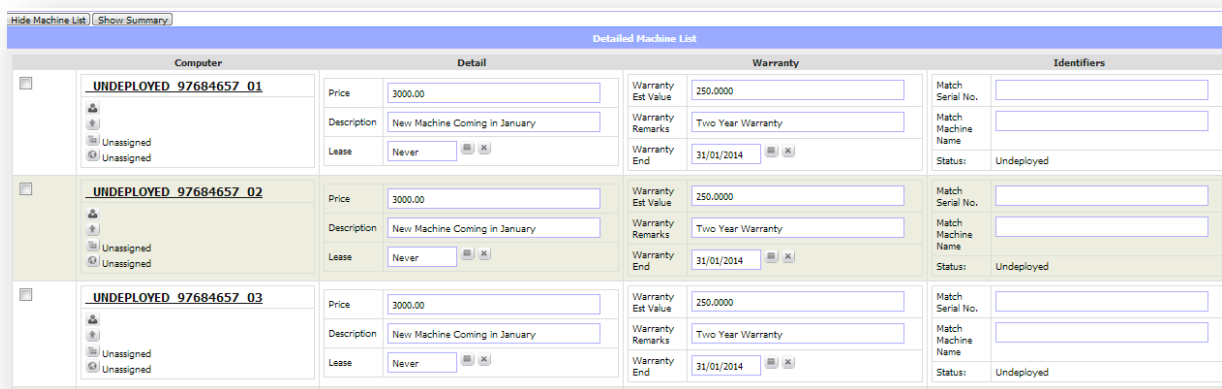
Detailed Machine List

<input type="checkbox"/> PC-0126066c8518 user-fb887bb3 Unassigned Loc-13	Price	0.00	Warranty Est Value	<input type="text"/>	Match Serial No.	<input type="text"/>
	Description	<input type="text"/>	Warranty Remarks	<input type="text"/>	Match Machine Name	<input type="text"/>
Lease	Never <input type="button" value="X"/>	Warranty End	Never <input type="button" value="X"/>	Status:	Undeployed	

- Click the **Add New Machines** button if you wish to add any new machine that will be deployed in the future.



- Fill in the details of the new machines and click **Create** button.
- The figure below show a list of new machines created.



Computer	Detail	Warranty	Identifiers
<input type="checkbox"/> UNDEPLOYED_97684657_01 Unassigned Unassigned	Price: 3000.00 Description: New Machine Coming in January Lease: Never	Warranty Est Value: 250.0000 Warranty Remarks: Two Year Warranty Warranty End: 31/01/2014	Match Serial No.: Match Machine Name: Status: Undeployed
<input type="checkbox"/> UNDEPLOYED_97684657_02 Unassigned Unassigned	Price: 3000.00 Description: New Machine Coming in January Lease: Never	Warranty Est Value: 250.0000 Warranty Remarks: Two Year Warranty Warranty End: 31/01/2014	Match Serial No.: Match Machine Name: Status: Undeployed
<input type="checkbox"/> UNDEPLOYED_97684657_03 Unassigned Unassigned	Price: 3000.00 Description: New Machine Coming in January Lease: Never	Warranty Est Value: 250.0000 Warranty Remarks: Two Year Warranty Warranty End: 31/01/2014	Match Serial No.: Match Machine Name: Status: Undeployed

- Note that the computer name is now temporary machine name created by SAMLite.
- Fill in the **Match Serial No. /Match Machine Name/Match Asset Tag** column under the Identifiers section.
- When there is a matched case, where the serial number or machine name of a machine detected is the same as the one you have just inserted, the temporary machine name will be replaced by the detected machine name.
- The status of the machines will be changed from **Undeployed** to **Active**.
- From the list of machines, you can remove any of it by checking the checkboxes and click the **Remove Machines** button.
- Click on the **Hide Machine List** button will hide the long listed machines and click again to show the full machine list.
- Click on the **Show Summary** button will show you the summary of the list of machines you have just added. Click again to hide the summary of the machines.

Purchase Full List

This page displays comprehensive details about the purchase order created.

This page is to display complete software details of purchase orders.

Total Purchased Quantity	4
Total Purchased Cost	0.00

6 records						
PO Number	Display Name	Quantity	Cost per unit	License Type	Support Expiry Date	
PO11111	Microsoft Office Professional Plus 2010	0	0.00	Default	Never	
PO11111	Microsoft Office Project Professional 2007	0	0.00	Default	Never	
PO2010030201	SAMLite 5.0	1	0.00	Default	6/11/2010	
PO2010030201	Microsoft Office Enterprise 2007	1	0.00	Default	Never	
PO2010030201	Microsoft Office Professional Plus 2010	1	0.00	Default	Never	
PO2010030201	Microsoft Office Project Professional 2007	1	0.00	Default	Never	

From this page, user can click on the PO Number which opens up another window with full details information of the click PO number. If user clicks on the Display Name it will show user of the details information of the software.

New Vendor

This is where user creates a list of vendor. This will be available for purchase order creation.

Vendor

Complete the form to create vendor. Select an existing vendor from the list to modify its details. Click + to add new vendor.

1 record	Search	Create new vendor				
✖ +	<input type="text"/>	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Vendor ID</th> <th style="width: 85%;">Vendor Name</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td>Default Vendor</td> </tr> </tbody> </table> </div> <div style="width: 50%;"> <p>Vendor ID* <input type="text"/></p> <p>Company <input type="text"/></p> <p>Person <input type="text"/></p> <p>Phone Number <input type="text"/></p> <p>Email <input type="text"/></p> <p>Address <input style="height: 20px;" type="text"/></p> <p>Description <input style="height: 20px;" type="text"/></p> </div> </div> <div style="text-align: right; margin-top: 10px;"> <input type="button" value="Create"/> </div>	Vendor ID	Vendor Name	<input type="checkbox"/>	Default Vendor
Vendor ID	Vendor Name					
<input type="checkbox"/>	Default Vendor					

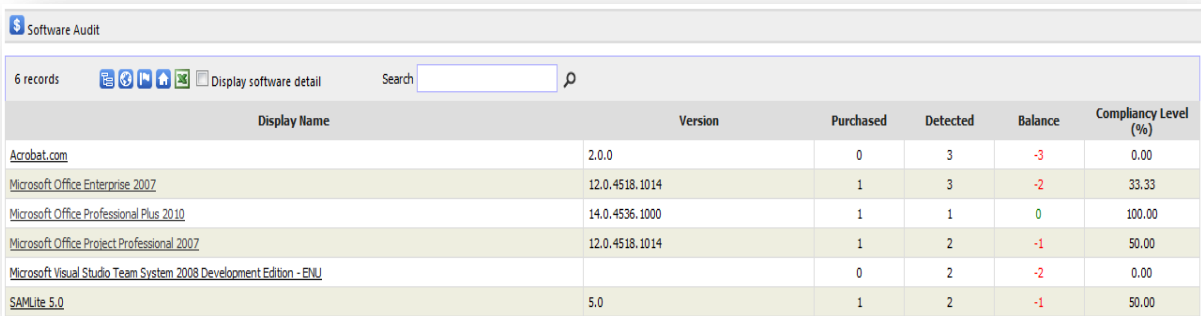
Field Name	Description
Vendor ID	Unique ID for vendor. This field is compulsory
Company	Vendor's Company. Normally is same as Vendor Unique ID. If you change the ID, the company will be changed as well
Person	Person/Vendor's Name
Phone Number	Vendors' Contact Number
Email	Vendor's Email Address
Address	Vendor's Company Address/Personal Address
Description	Additional notes for current vendor

License Type

This is where user creates types of license. This will be available for purchase order creation.

Reconciliation

Software Reconciliation



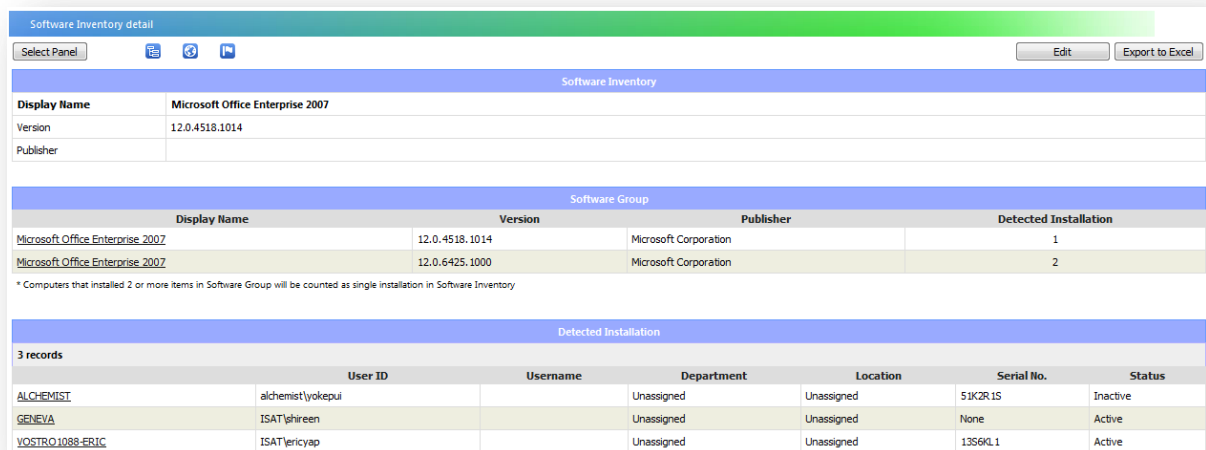
Display Name	Version	Purchased	Detected	Balance	Compliance Level (%)
Acrobat.com	2.0.0	0	3	-3	0.00
Microsoft Office Enterprise 2007	12.0.4518.1014	1	3	-2	33.33
Microsoft Office Professional Plus 2010	14.0.4536.1000	1	1	0	100.00
Microsoft Office Project Professional 2007	12.0.4518.1014	1	2	-1	50.00
Microsoft Visual Studio Team System 2008 Development Edition - ENJ		0	2	-2	0.00
SAMLite 5.0	5.0	1	2	-1	50.00

Software Reconciliation is to identify the licensing gaps and compliancy level of software.

Column Name	Description
Display Name	Name of Software, together with Version.
Purchased	Total purchased unit of software
Detected	Number of machines that detected software installation
Balance	Purchase Balance. Value in red means Under Purchase while Value in Blue means over purchased.
Compliancy	Compliancy level. It is to determine the percentage between Purchases and detected installation. If the purchase has more than or equal to installation, the percentage will be displayed as 100.00%

Click a software name from the list to display details of selected software.

Figure below show the details when software name is clicked:



Software Inventory detail

Select Panel [Icons] Edit Export to Excel

Software Inventory

Display Name	Microsoft Office Enterprise 2007		
Version	12.0.4518.1014		
Publisher	Microsoft Corporation		

Software Group

Display Name	Version	Publisher	Detected Installation
Microsoft Office Enterprise 2007	12.0.4518.1014	Microsoft Corporation	1
Microsoft Office Enterprise 2007	12.0.6425.1000	Microsoft Corporation	2

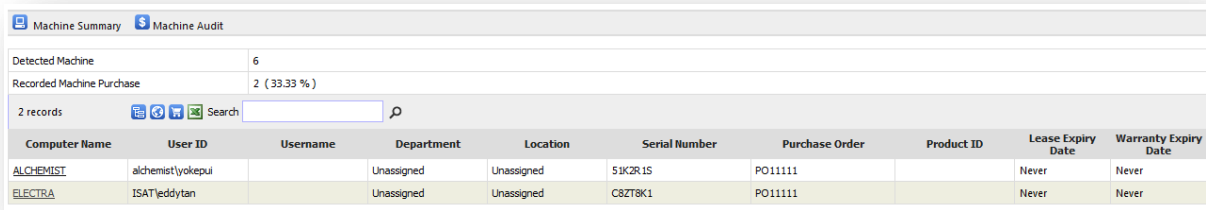
* Computers that installed 2 or more items in Software Group will be counted as single installation in Software Inventory

Detected Installation

3 records

User ID	Username	Department	Location	Serial No.	Status
ALCHEMIST	alchemist\yokepui	Unassigned	Unassigned	51K2R1S	Inactive
GENEVA	ISAT\ghireen	Unassigned	Unassigned	None	Active
VOSTRO1088-ERIC	ISAT\ericyp	Unassigned	Unassigned	1356K1	Active

Machine Reconciliation



The screenshot shows the 'Machine Audit' section of the SAMLite interface. It displays a summary of detected machines (6) and recorded machine purchases (2, 33.33%). Below this is a table with 2 records, showing columns for Computer Name, User ID, Username, Department, Location, Serial Number, Purchase Order, Product ID, Lease Expiry Date, and Warranty Expiry Date. Two records are visible: 'ALCHEMIST' and 'ELECTRA'.

Computer Name	User ID	Username	Department	Location	Serial Number	Purchase Order	Product ID	Lease Expiry Date	Warranty Expiry Date
ALCHEMIST	alchemist\yokepui		Unassigned	Unassigned	51K2R1S	PO11111		Never	Never
ELECTRA	ISATleddytan		Unassigned	Unassigned	C8ZT8K1	PO11111		Never	Never

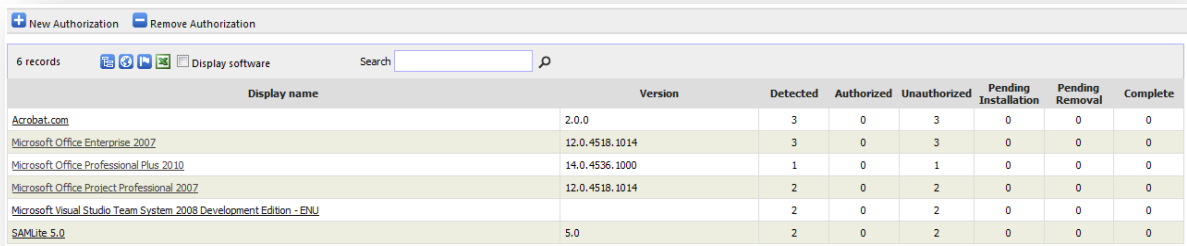
Machine reconciliation is to check Lease Expiry Date and Warranty date of machines. It is also to check the purchase information of the machines.

Column Name	Description
Computer Name	Display Computer Name
Username	Name of the user who owns the machine
Department	Department of machines
Location	Where machines is located
Serial Number	Machines' serial number
Lease Expiry date	Lease Expiry date
Warranty Expiry Date	Warranty Date
Purchase Order	Purchase information that already bound to machine
Product ID	Recorded Product ID from PO

Software Authorization

- Authorization List
- Authorization History
- Add Authorization
- Remove Authorization

Authorization List



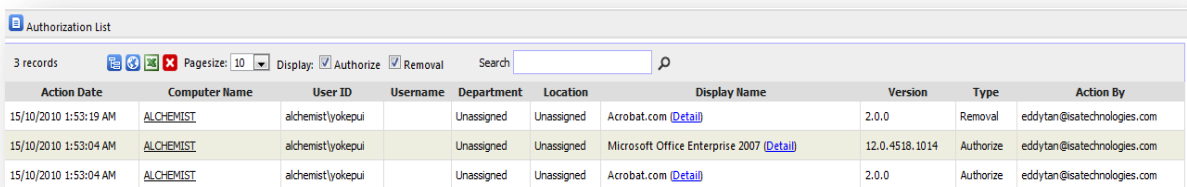
Display name	Version	Detected	Authorized	Unauthorized	Pending Installation	Pending Removal	Complete
Acrobat.com	2.0.0	3	0	3	0	0	0
Microsoft Office Enterprise 2007	12.0.4518.1014	3	0	3	0	0	0
Microsoft Office Professional Plus 2010	14.0.4536.1000	1	0	1	0	0	0
Microsoft Office Project Professional 2007	12.0.4518.1014	2	0	2	0	0	0
Microsoft Visual Studio Team System 2008 Development Edition - ENU		2	0	2	0	0	0
SAMLite 5.0	5.0	2	0	2	0	0	0

This page will show user of a list of purchased software detected, number of software authorized for use, number of software unauthorized for use, number of software pending installation, number of software pending removal because of unauthorized usage and number of software completed removing using unauthorized software.

When software name is clicked, user will be able to see machines list detected with this software, which are the machines has authorization and unauthorization.

Authorization History

This page is to store the records that you have done new authorization and remove authorization.



Action Date	Computer Name	User ID	Username	Department	Location	Display Name	Version	Type	Action By
15/10/2010 1:53:19 AM	ALCHEMIST	alchemist\yokepui		Unassigned	Unassigned	Acrobat.com (Detail)	2.0.0	Removal	eddytan@isatechnologies.com
15/10/2010 1:53:04 AM	ALCHEMIST	alchemist\yokepui		Unassigned	Unassigned	Microsoft Office Enterprise 2007 (Detail)	12.0.4518.1014	Authorize	eddytan@isatechnologies.com
15/10/2010 1:53:04 AM	ALCHEMIST	alchemist\yokepui		Unassigned	Unassigned	Acrobat.com (Detail)	2.0.0	Authorize	eddytan@isatechnologies.com

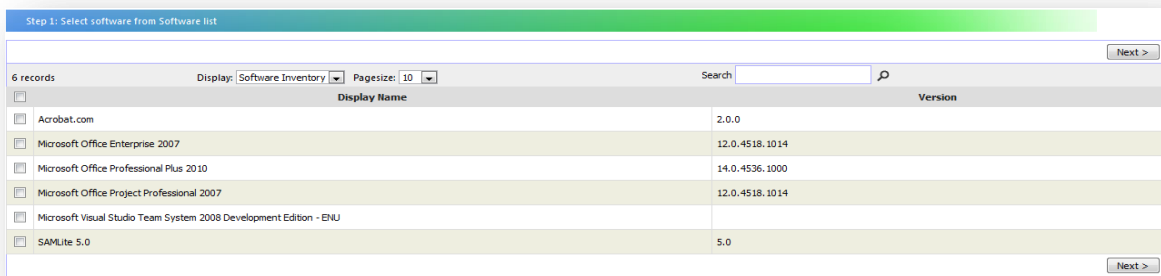
Item/Column	Description
Action Date	Date when authorization is given or removes.
Computer Name	Machine hostname.
User Id	Id of the user for the machine.
Username	The name of the user for the machine.
Department	Machine's Department
Location	Where is this machine located

Display Name	Software Name
Version	Software version
Type	Show what type of authorization been conducted, Authorize or Removal
Action By	User that made this action to give authorization or to remove authorization

Add Authorization

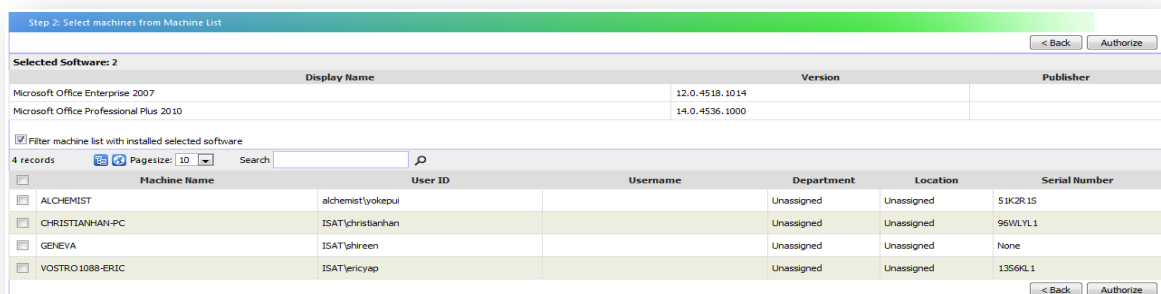
- This page is to authorize to allow software installation of machines. There are 2 steps in this page:

a. Select software



Display Name	Version
Acrobat.com	2.0.0
Microsoft Office Enterprise 2007	12.0.4518.1014
Microsoft Office Professional Plus 2010	14.0.4536.1000
Microsoft Office Project Professional 2007	12.0.4518.1014
Microsoft Visual Studio Team System 2008 Development Edition - ENU	
SAMLite 5.0	5.0

b. Select machine



Machine Name	User ID	Username	Department	Location	Serial Number
ALCHEMIST	alchemist\yokepui		Unassigned	Unassigned	51K2R.1S
CHRISTIAN/HAN-PC	ISAT\christianhan		Unassigned	Unassigned	96WLYL1
GENEVA	ISAT\ghireen		Unassigned	Unassigned	None
VOSTRO1088-ERIC	ISAT\ericvap		Unassigned	Unassigned	1356KL.1

- Click "Authorize". Now you have added authorization.

Remove Authorization

- This page is to remove authorization of the software installation. There are 2 steps in this page:

a. Select a software

Step 1: Select authorized software from list

The list will display only software that has authorization records. Skip to Machine Remove All Next >

2 records Pagesize: 10 Search

<input type="checkbox"/>	Display Name	Version
<input type="checkbox"/>	Microsoft Office Enterprise 2007	12.0.4518.1014
<input type="checkbox"/>	Microsoft Office Professional Plus 2010	14.0.4536.1000

Skip to Machine Remove All Next >

b. Select a machine

Step 2: Select machine from list

< Back Remove

Selected Software: 1

Display Name	Version	Publisher
Microsoft Office Professional Plus 2010	14.0.4536.1000	

The list is displaying machines that authorized installation of selected software. If no software is selected, it will display machines that have authorized installation of any software.

1 record Pagesize: 10 Search

<input type="checkbox"/>	Machine Name	User ID	Username	Department	Location	Serial Number
<input type="checkbox"/>	GENEVA	ISAT\shreen		Unassigned	Unassigned	None

< Back Remove

2. Click on "Remove". Now authorization is already remove.

Software Bind

This page is to bind the purchased software to software installation. The purpose is to link a few details from purchase to the installed software on machines such as cost, support expiry date. It is to determine the exact amount of purchased software quantity that already being used.

When you bind the purchase to installation, all selected installation will be set to authorize to use the software.

Pre-requisite:

- At least 1 purchased software
- Users must have the following rights:
 - License Purchase Moderator
 - License Authorization Moderator

There are 2 steps in this page:

- 1) Select a purchased software
- 2) Select machines that detected installation

In Step 1, you need to select PO Number and select software you would like to bind them.

Step 1: Select a purchase order, then select a software from purchase order

Purchase Order: Click one PO Number

2 records Search

PO Number	Purchased Date	Vendor	Software Product
PO11111	14/10/2010	Default Vendor	2
PO2010030201	13/10/2010	Default Vendor	4

Purchased Software: Click one Display Name

Display Name	Version	License	Unit Cost	Quantity	Recorded	Detected Installation
Microsoft Office Professional Plus 2010	14.0.4536.1000	Default	0.00	0	0	1
Microsoft Office Project Professional 2007	12.0.4518.1014	Default	0.00	0	0	2

In Step 2, select machines to bind with selected software done in step 1

Step 2: Select machines with Installation that will bind to selected purchased software.

Display authorized installation only
 Display records not bound to purchase only

2 records Pagesize: 10 Search

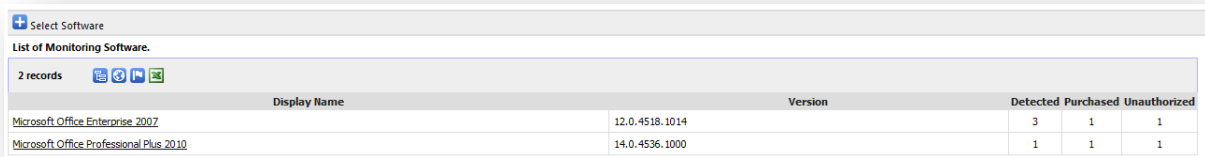
<input type="checkbox"/>	Computer Name	User ID	Username	Department	Location	Status	Serial Number	Authorized	Bound to purchase
<input type="checkbox"/>	ALCHEMIST	alchemist\yokepui		Unassigned	Unassigned	Inactive	51K2R1S	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	VOSTRO1088-ERIC	ISAT\ericyp		Unassigned	Unassigned	Active	1356K1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

After you have done, click **“Bind”**

Note: If selected machines have already bound to purchase, a confirmation page will be displayed. Click Confirm to change the Software Purchase of notified machines.

Software Monitor

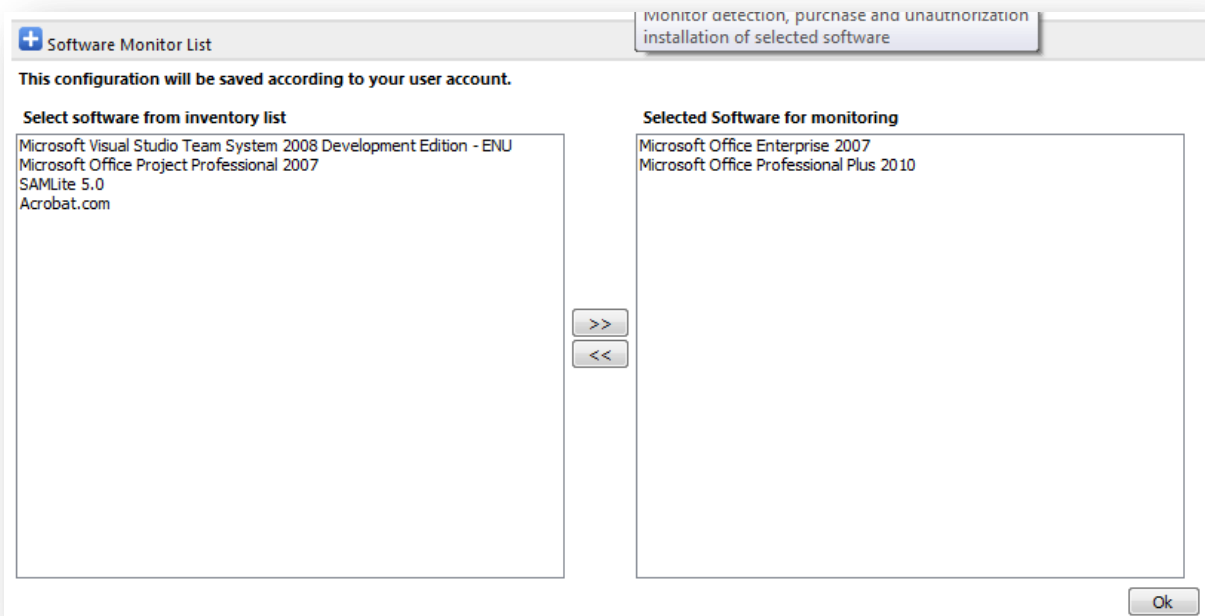
Allows user to manage and monitor software that really interest them.



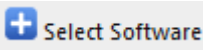

Display Name	Version	Detected	Purchased	Unauthorized
Microsoft Office Enterprise 2007	12.0.4518.1014	3	1	1
Microsoft Office Professional Plus 2010	14.0.4536.1000	1	1	1

In this page, user will only see software they want to monitor; other unnecessary software will be excluded from the list.


In order to add more software to be monitored into the list, click on “**Select Software**”. Figure below show the list of software available, this software is software already purchased by user.



Here are the steps to add software:

1. Click on  and it will lead you to a page where you can select software from a list.
2. Select the software title from the **left** pane, and then click .
3. The selected software will be added to the right pane.

Here are the steps to remove software:

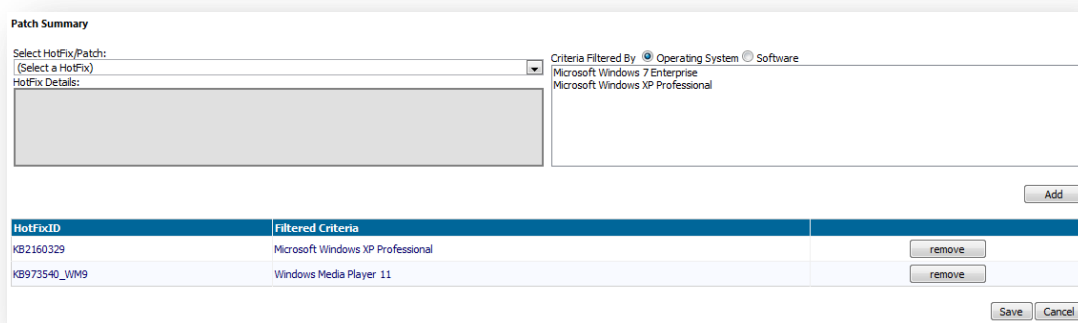
1. Select the software title from the **right** pane, and then click .

- The removed software will be moved back to the left pane.

Click “Ok” button to save your changes and exit the page.

Patch Monitor

Allows user to manage and monitor patch/hotfix that is important.



Patch Summary

Select HotFix/Patch: (Select a HotFix)

HotFix Details:

Criteria Filtered By: Operating System Software

Microsoft Windows 7 Enterprise
Microsoft Windows XP Professional

HotFixID	Filtered Criteria	
KB2160329	Microsoft Windows XP Professional	<input type="button" value="remove"/>
KB973540_WM9	Windows Media Player 11	<input type="button" value="remove"/>

Here are the steps to add hotfix:

- Select the hotfix name from the “Select a Hotfix” **drop down list**.
- The selected hotfix will be shown at the left pane.
- Select either **operating system** or **software** that is required to be installed with the selected software at the **right pane**.
- Click “Add” button to add the selected hotfix to the monitoring list.

Here are the steps to remove hotfix:

- Click “Remove” button of the selected hotfix.
- The monitoring list will be updated immediately.

Click “Save” button to save your changes and exit the page.