



License Management

Software and License Management in Docusnap

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1. INTRODUCTION

The topic of software and license management can be an arduous task in daily work. In many environments, software management is performed by using Excel lists. In these environments, it is virtually impossible to make reliable statements about actual software usage.

With the license management module in Docusnap you can dynamically manage your software products. You can perform analyses on which systems and which software products are installed (actual state). You can also define how many licenses were procured for the software products used (target state). The supplied reports inform you regularly and time-controlled by e-mail about the current license usage (variance comparison).

The data basis for license management is the network inventory (Windows, Linux, Mac and Active Directory). In doing so, care must be taken to ensure appropriate data quality. The inventory of the systems must be complete and up-to-date!

This HowTo describes the implementation of the license management in Docusnap with all its functions and possibilities as well as application examples.

- [Chapter 3](#) contains everything you need to know about creating license definitions.
- [Chapter 4](#) describes the creation of extended / more specific license definitions.
- [Chapter 5](#) explains how to use the information stored in Docusnap for the analysis.
- [Chapter 6](#) describes how to use the Assignment Wizard - it provides advanced features related to license management.
- [Chapter 7](#) contains further topics, such as
 - the export and import of license definitions
 - the exclusion of systems during license counting
 - and creating message definitions to notify you when a license or software maintenance contract expires
- [Chapter 8](#) provides some examples of applications.

2. INVENTORIES AND DATA QUALITY

As already mentioned in the introduction, the data basis in license management consists of the network inventory. For this reason, you must attach particular importance to the completeness and timeliness of your network inventory. If, for example, only 50% of your Windows systems are inventoried, you can also map only 50% of your license usage.

You can find more information about the inventory on our website in the Knowledge Base as well as in the Video Tutorials (also on YouTube - Docusnap - All-in-One solution for IT documentation):

- [Docusnap Script Windows](#)
- [Windows Firewall Exceptions](#)
- [WMI Access Problems](#)
- [White Paper Docusnap Inventory](#)
- [Docusnap Script Linux](#)

3. CREATE LICENSE DEFINITIONS

In the area of license management, so-called license definitions are created. These license definitions can be described as a kind of container containing all relevant information regarding the software and license.

You can create and manage license definitions in two ways:

- License Management Wizard
- Assignment Wizards.

The actual steps that are carried out during the creation of the license definition are largely the same. A distinction exists with regard to the entry to creation and with regard to product recognition.

This chapter covers the variant of the **License Management Wizard**. [Chapter 6](#) describes the creation via the Assignment Wizard and the further possibilities for defining software products that exist beyond this (subject to licensing, not subject to licensing, unwanted, etc.).

Start the License Management Wizard as follows. First, navigate to **License Management** via the main navigation bar. You will then find the **New** control in the ribbon.

If you want to edit an existing license definition, you can do this using the **Edit** control. You can also use the **Edit License** control to jump directly to this step.

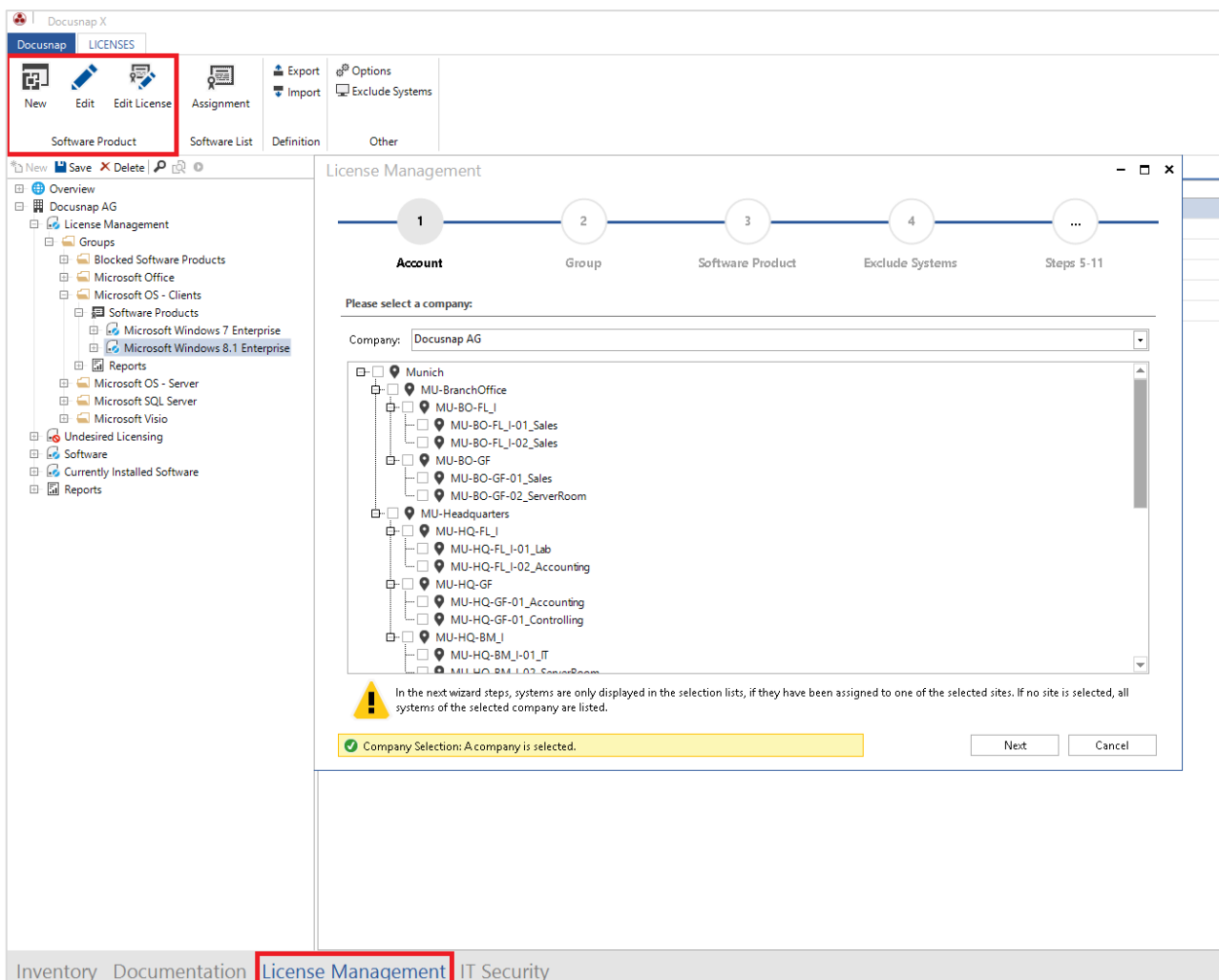


Fig. 1 - Starting the License Management Wizard

3.1 COMPANIES AND LOCATION SELECTION

The first step consists of the selection of the company and a possible mapping of licenses to a specific [location](#) - [this topic will be dealt with in the following chapter](#).

3.2 CREATION AND SELECTION OF SOFTWARE GROUPS

Step number 2 - **Group** - allows you to further categorize the license definitions. This way you can sort the licenses by different categories. During the license analysis, you can perform evaluations for individual software products, software groups, locations, and the entire company.

Examples of software groups:

- Microsoft Office
- Microsoft Client Operating Systems
- Microsoft Server Operating Systems
- Microsoft SQL Server
- Adobe

3.3 SOFTWARE PRODUCT - PROPERTIES OF A LICENSE DEFINITION

In step 3 - **Software product** - properties regarding the license definition are stored. The properties of a license definition include the following:

- **Software Product:** Name of the software product for which the definition is created.
- **Publisher:** Name of publisher
- **Version:** Version of the software product
- **With Detection of Use**

Used licenses are recorded on the basis of inventoried software products. An inventoried software product is assigned to the license definition. Based on the found installations, the consumption can be determined automatically and dynamically.

- **Upgrade / Downgrade**

Authorized upgrade or downgrade installations. For example Windows 7 -> Windows 10

- **Metric:** According to which criteria is the license usage counted?

3.3.1 METRICS

A metric forms the calculation basis. The following calculation bases and metrics are available:

No matches: The calculation is based on the installations found. No assignment means that no devices or users are assigned to the licenses.

Available metrics: Standard license

Devices: The calculation is based on the installations found. In addition, device assignments can be defined in the step on which devices the software is to be installed. This assignment is then taken into account in the tree when evaluating desired and unwanted installations.

Available metrics: Device license, Qualified Devices, Server

Users: In the User Assignment Wizard step, the users and groups that use this software are assigned. When the license balance is calculated, the number of assigned users and the number of users in the assigned groups are used.

Available metrics: User license, Qualified Users, Named Users, Concurrent User

Processors: The number of processors of the systems on which the software was found is used for the calculation. In addition, the Assistant Step Device Assignment can be used to define on which devices the software should be installed.

Available metrics: Processor license

Processor cores: The number of processor cores of the systems on which the software was found is used for the calculation. In addition, the Assistant Step Device Assignment can be used to define on which devices the software should be installed.

Available Metrics: Processor Core License

Devices and Users: With Device and User Assignment, licenses can be created for devices and users. Device licenses are used to calculate the license balance, the user licenses are also listed. This metric can only be used without a user ID.

License Management

1 Account 2 Group 3 **Software Product** 4 Exclude Systems ... Steps 5-11

Properties

Software Product:

Publisher: Version:


☒ With Detection of Use Metric:

☐ Add Upgrade/Downgrade ☐ Licensed software

Additional Information

B / **I** / **U** **abc** **A** **B** **I** **U** **abc** **A**

Standard license
 Standard license
 Device license
 User license
 Processor license
 Processor core license
 Blocked software products
 Qualified Devices
 Qualified Users
 Named Users
 Concurrent User
 Server

i If you intend to assign multiple software products to the licensing, fill in, if necessary, only the... 

Back Next Cancel

Fig. 2 - License Definition Properties and Metrics

3.4 EXCLUDE SYSTEMS

In the Exclude Systems step, you can select systems that are not to be included in the count. For example, you can exclude installations on a test system in this way.

3.5 PRODUCT RECOGNITION

If you have not disabled the **With Detection of Use** feature in step 3 - **Software Product** - you will find the **Product Recognition** step.

In this step, you can first restrict to servers, workstations, Linux systems, or Mac systems. The license definition then only counts the installations on the selected system types.

You also make the assignment to an inventoried software. Three filter modes are available for this assignment, which are described below.

3.5.1 PRODUCT RECOGNITION - KEYWORDS

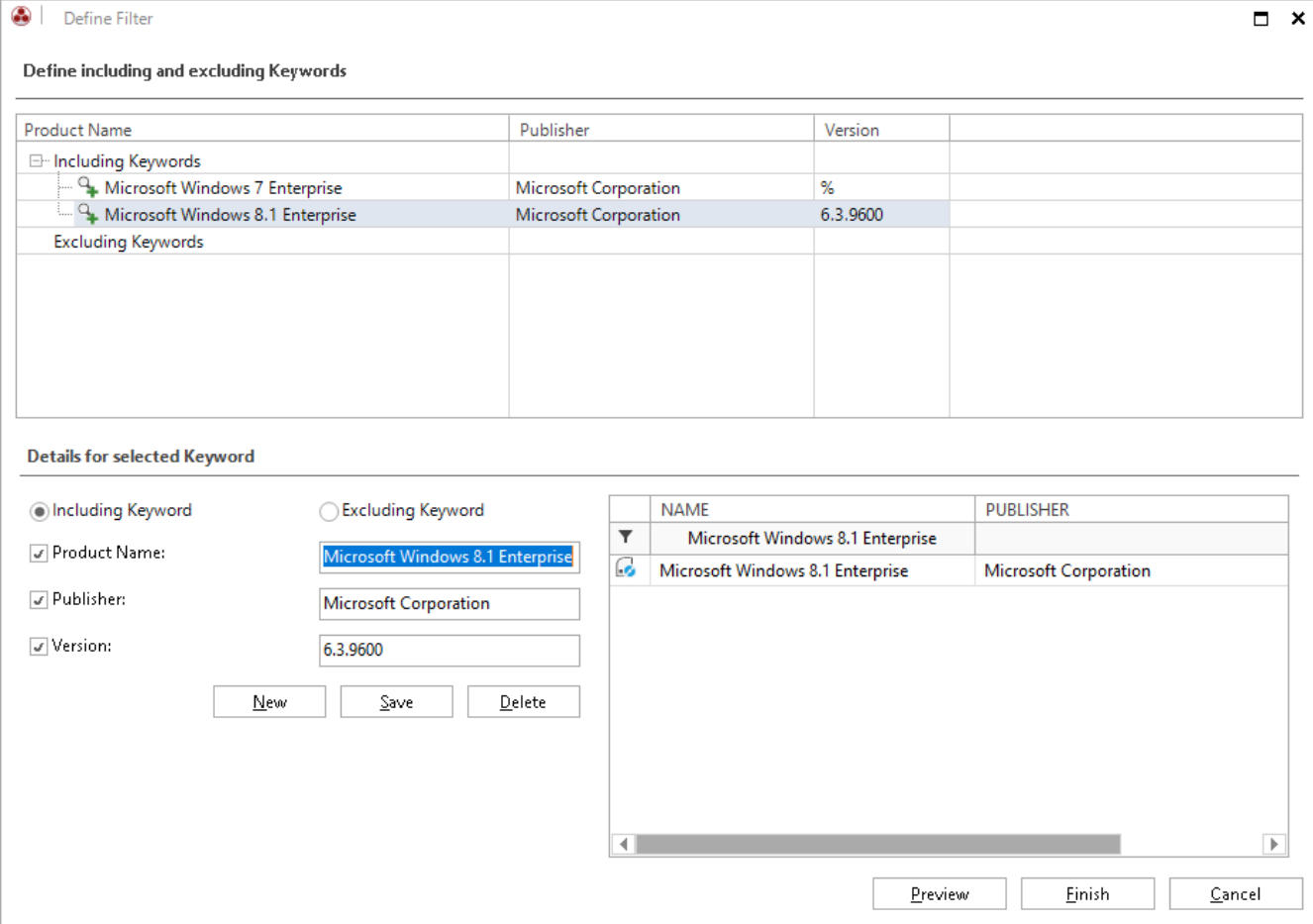
You use the search words to build up a suitable string comparison, which is used to assign the software product. Use * as a wildcard. After you have only the desired software product(s) listed, copy the search word into the field **Product name** and **Save** it.

Including and **excluding** search words are available. You can define search terms for the Product Name, Publisher, and Version fields. The fact that you can ignore the version with this filter mode results in less maintenance effort.

You can also combine several search words with each other using a **logical OR**. Here a condition of the search words must apply for a license usage to exist. The following figure shows, for example, the search terms

- *Microsoft Windows 7 Enterprise*
- OR * Microsoft Windows 8.1 Enterprise*

A license usage exists if *Microsoft Windows 7 Enterprise* OR *Microsoft Windows 8.1 Enterprise* is installed on a system.



Define Filter

Define including and excluding Keywords

Product Name	Publisher	Version
Including Keywords		
Microsoft Windows 7 Enterprise	Microsoft Corporation	%
Microsoft Windows 8.1 Enterprise	Microsoft Corporation	6.3.9600
Excluding Keywords		

Details for selected Keyword

☒ Including Keyword
 ☐ Excluding Keyword

☒ Product Name: Microsoft Windows 8.1 Enterprise
☒ Publisher: Microsoft Corporation
☒ Version: 6.3.9600

NAME	PUBLISHER
Microsoft Windows 8.1 Enterprise	Microsoft Corporation

Fig.3 - Filter Mode Search Words

3.5.2 PRODUCT RECOGNITION - EXTENDED FILTER MODE

The extended filter mode also uses search words for the assignment to a software product. The difference to the search words is that, in addition to a logical **OR**, you can also link the search words with a logical **AND** and other operators are available.

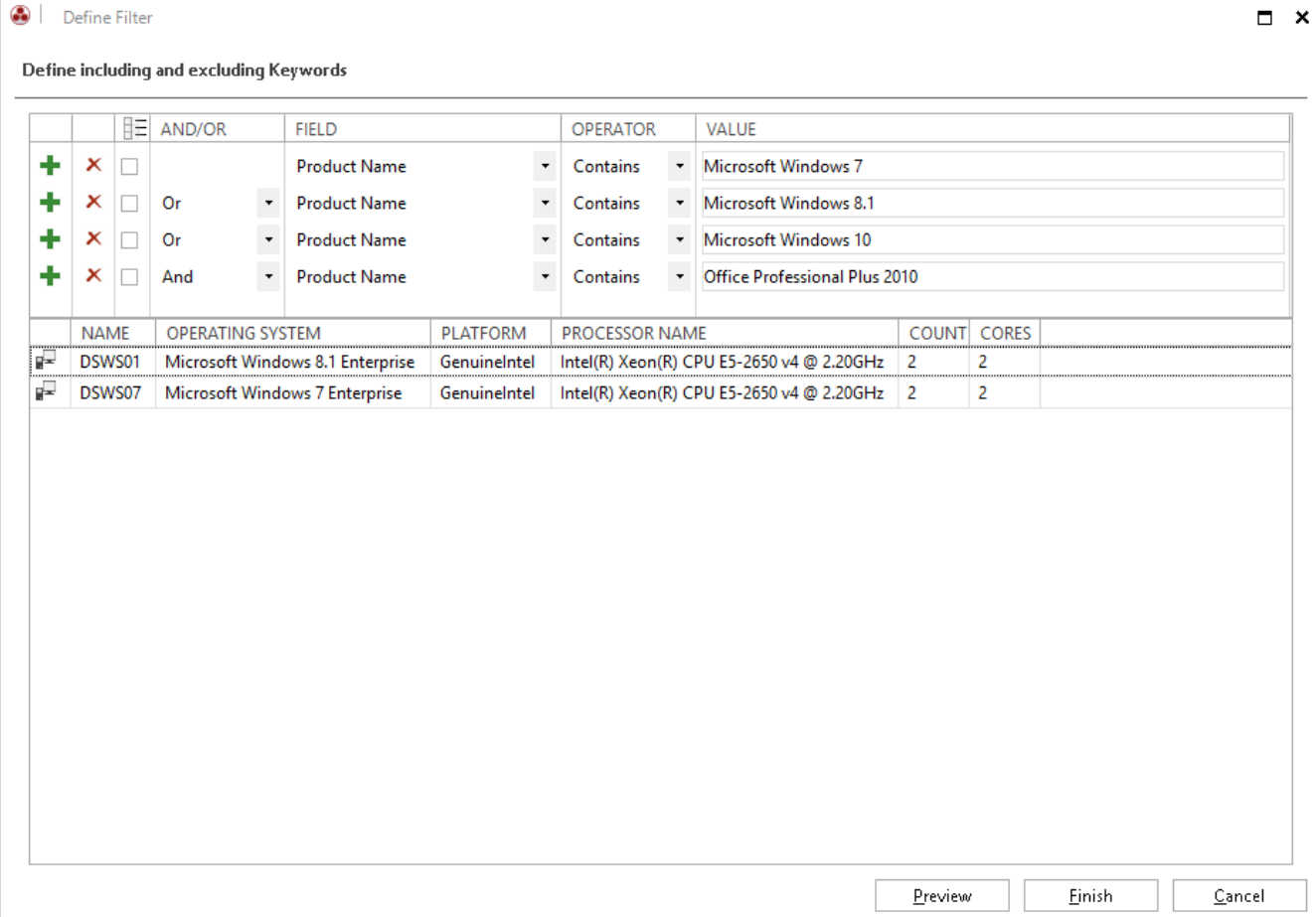
Here you can also apply the search words to the fields Product Name, Publisher and Version. Here, too, you can ignore the version, which leads to less maintenance effort.

As operators, you have the choice between

- Contains
- Does not contain
- Starts with
- Ends with
- = (equal)
- <> (unequal)

The checkboxes that you can activate in the third column offer a grouping of the search conditions. For example, two search conditions can be linked with **OR** and a further condition can be added with **AND**.

The following figure shows a search condition with **AND** and **OR** - without grouping:



Define Filter


Define including and excluding Keywords

			AND/OR	FIELD	OPERATOR	VALUE
+	×	<input type="checkbox"/>		Product Name	Contains	Microsoft Windows 7
+	×	<input type="checkbox"/>	Or	Product Name	Contains	Microsoft Windows 8.1
+	×	<input type="checkbox"/>	Or	Product Name	Contains	Microsoft Windows 10
+	×	<input type="checkbox"/>	And	Product Name	Contains	Office Professional Plus 2010

	NAME	OPERATING SYSTEM	PLATFORM	PROCESSOR NAME	COUNT	CORES
DSWS01	Microsoft Windows 8.1 Enterprise	GenuineIntel	Intel(R) Xeon(R) CPU E5-2650 v4 @ 2.20GHz	2	2	
DSWS07	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R) CPU E5-2650 v4 @ 2.20GHz	2	2	


Preview Finish Cancel

Fig. 4 - AND / OR Search Condition without Grouping

 Define Filter

Define including and excluding Keywords

			AND/OR	FIELD	OPERATOR	VALUE
+	×	<input type="checkbox"/>		Product Name	Contains	Microsoft Windows 7
+	×	<input type="checkbox"/>	Or	Product Name	Contains	Microsoft Windows 8.1
+	×	<input type="checkbox"/>	Or	Product Name	Contains	Microsoft Windows 10
+	×	<input type="checkbox"/>	And	Product Name	Contains	Office Professional Plus 2010

	NAME	OPERATING SYSTEM	PLATFORM	PROCESSOR NAME	COUNT	CORES
	DSWS07	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R) CPU E5-2650 v4 @ 2.20GHz	2	2

Preview

Finish

Cancel

Fig. 5 - AND / OR Search Condition with Grouping

The first figure, without grouping the search condition, returns an incorrect result! If you want to combine several OR links with one AND link, you should always group the search condition.

3.5.3 PRODUCT RECOGNITION - SOFTWARE LIST

When you select the software list, each inventoried software product is listed. Use the **Search** function to narrow down the software products displayed. Select the required software products using the **Add** control.

As you can see from the following figure, the different versions of the software products are listed. As a result, in future you will have to enter new versions of the software product when using the software list, and the license usage will be adjusted.

Furthermore, when using the software list, the software product is defined as subject to license and linked to the created license definition. Further information on this topic can be found in the chapter [Software List / Assignment Wizard](#).

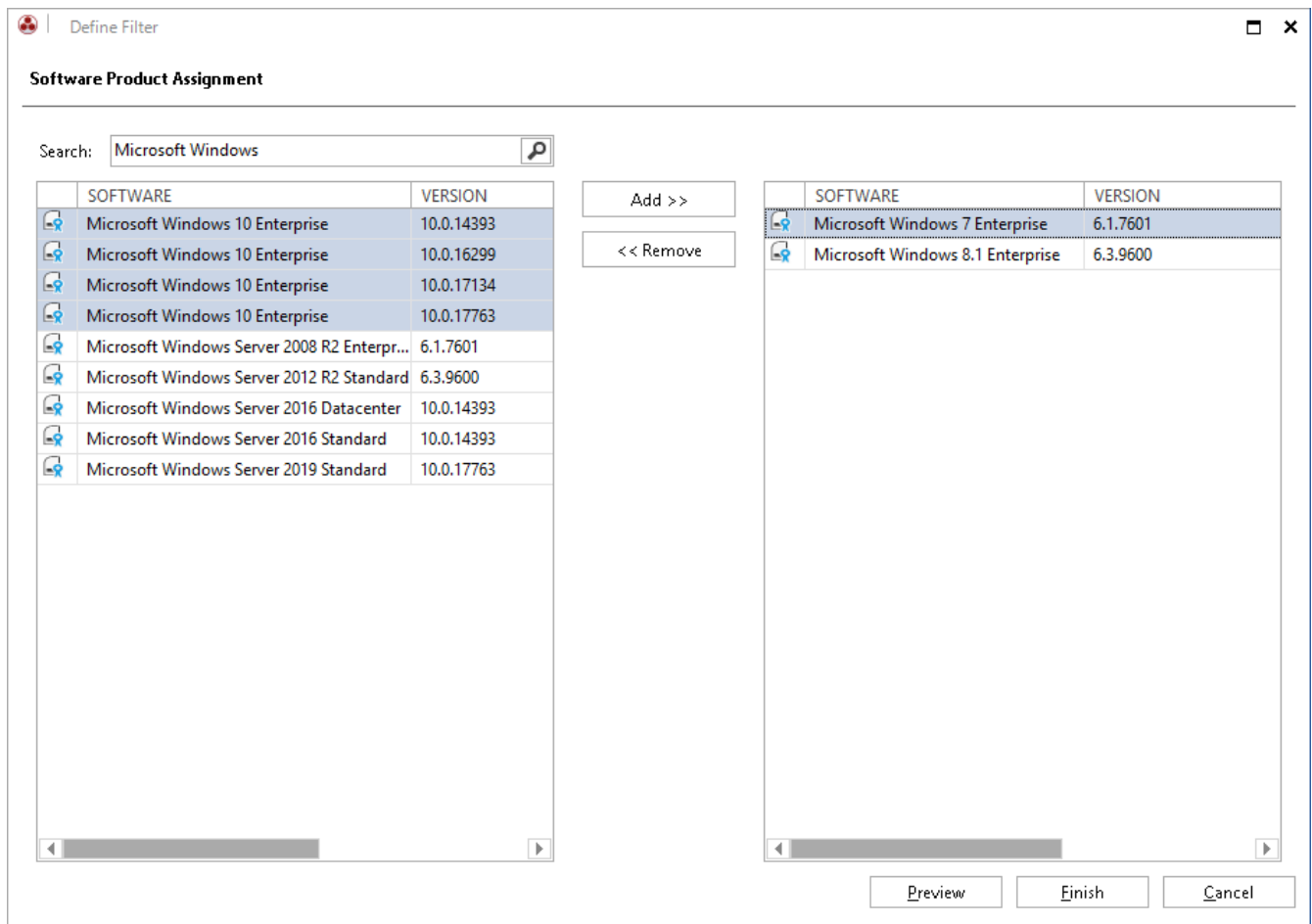


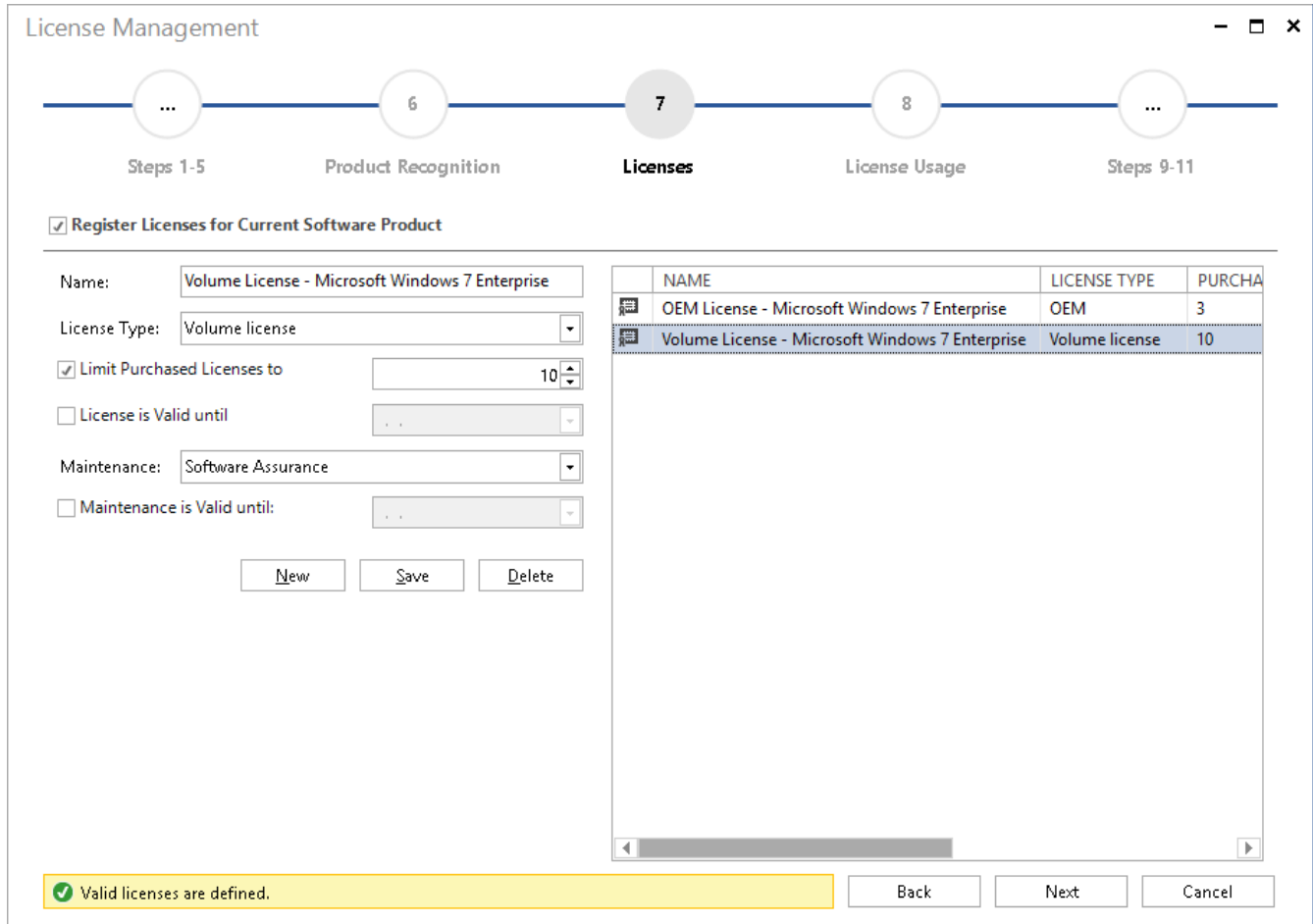
Fig.6 - Software List

3.6 LICENSES

In the Licenses step, you can now enter the number of licenses you have purchased for the software product. Specify a description, a type, and the number of licenses.

You can also define a license validity and a maintenance contract with a corresponding validity. In [Chapter 7.3 - Message Definitions](#) - you will find a description of how to be informed about the expiration of the validity.

In Docusnap Administration - License Management you can extend the license and maintenance types.



License Management

Steps 1-5 Product Recognition **7 Licenses** 8 License Usage Steps 9-11

☒ Register Licenses for Current Software Product

Name:

License Type:

☒ Limit Purchased Licenses to

☐ License is Valid until

Maintenance:

☐ Maintenance is Valid until:

NAME	LICENSE TYPE	PURCHASE
OEM License - Microsoft Windows 7 Enterprise	OEM	3
Volume License - Microsoft Windows 7 Enterprise	Volume license	10

☒ Valid licenses are defined.

Fig.7 - Creating Licenses

3.7 ADDITIONAL INFORMATION - CONTRACTS

The step - Contracts - gives you the possibility to create additional information of the type Contract for the previously created licenses - or you can also create an existing contract.

This contract may, for example, reflect the license agreement. Within additional information, you can also store attachments - for example, the license document, the invoice, etc.

Further information regarding the additional information can be found in the HowTo "Additional Information".

License Management

...

8



9

10


11

Steps 1-7
License Usage
Summary
Contracts
Comments

Add Contracts

	LABEL	LICENSE TYPE	PURCHASED	VALID UNTIL	MAINTENANCE TYPE	MAINTENANCE VALID UN...
	OEM License - Microsoft Windows...	OEM	3	Unlimited	Software Assurance	Unlimited
	Volume License - Microsoft Windo...	Volume license	10	Unlimited	Software Assurance	Unlimited

+ New
Add Existing Contract
Edit Contract
Delete Contract

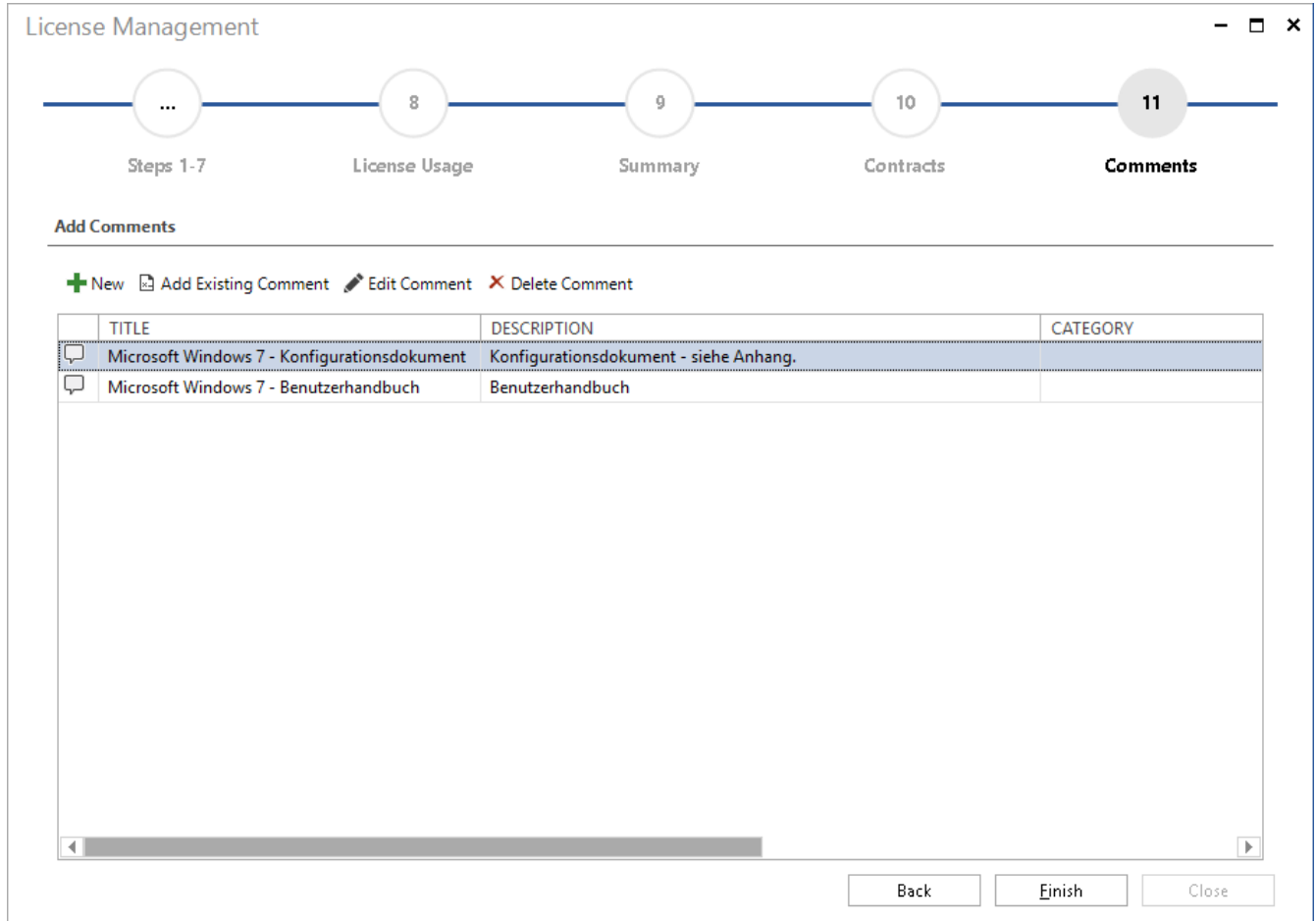
	TITLE	CONTRACT NUMBER	CONTRACT TYPE	CUSTOMER NUMBER
	Microsoft Windows 7 Enterprise - OEM License Contract	ABC1234-123-CDE	License Contract	ABC0987654321

Back
Next
Close

Fig.8 - Adding a Contract

3.8 ADDITIONAL INFORMATION - COMMENTS

In addition to contracts, you can also store additional information of the type Comment of a license definition. Here you can, for example, store a user manual, installation instructions or other information concerning the software product.





License Management

Steps 1-7 License Usage Summary Contracts **Comments**

Add Comments

+ New Add Existing Comment Edit Comment Delete Comment

	TITLE	DESCRIPTION	CATEGORY
	Microsoft Windows 7 - Konfigurationsdokument	Konfigurationsdokument - siehe Anhang.	
	Microsoft Windows 7 - Benutzerhandbuch	Benutzerhandbuch	

Back Finish Close

Fig.9 - Add Comment

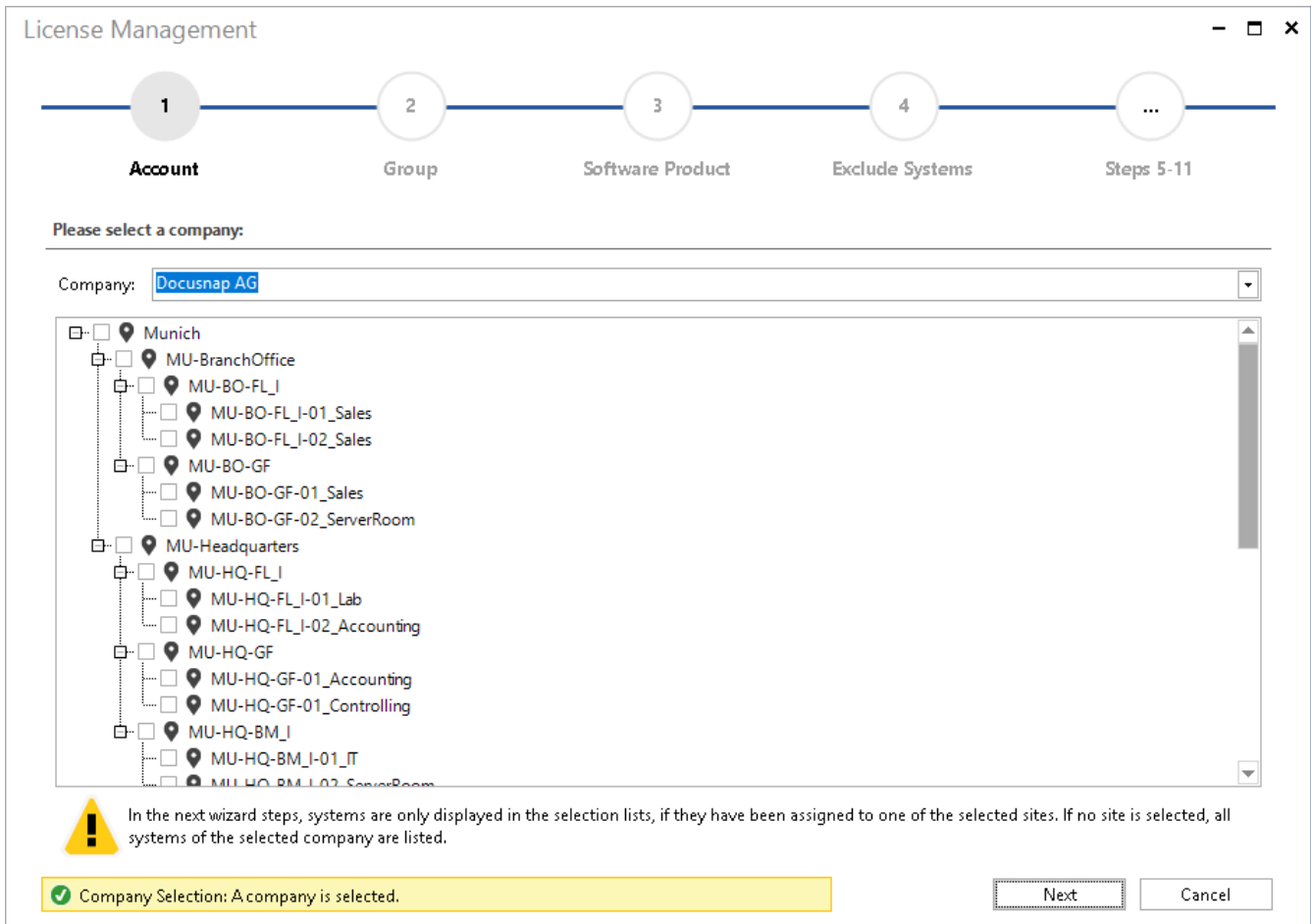
4. CREATE EXTENDED LICENSE DEFINITIONS

4.1 LOCATION EVALUATIONS

By using the locations in license management, it is possible to carry out evaluations at location level.

When using this function, only systems from the assigned locations will be taken into account later in the evaluation.

If the Create License Definition Wizard has opened, you can perform an assignment of locations in step 1 - Company.



License Management

1 2 3 4 ...

Account Group Software Product Exclude Systems Steps 5-11

Please select a company:

Company: **Docusnap AG**

- ☐ **Munich**
 - ☐ **MU-BranchOffice**
 - ☐ **MU-BO-FL_I**
 - ☐ **MU-BO-FL_I-01_Sales**
 - ☐ **MU-BO-FL_I-02_Sales**
 - ☐ **MU-BO-GF**
 - ☐ **MU-BO-GF-01_Sales**
 - ☐ **MU-BO-GF-02_ServerRoom**
 - ☐ **MU-Headquarters**
 - ☐ **MU-HQ-FL_I**
 - ☐ **MU-HQ-FL_I-01_Lab**
 - ☐ **MU-HQ-FL_I-02_Accounting**
 - ☐ **MU-HQ-GF**
 - ☐ **MU-HQ-GF-01_Accounting**
 - ☐ **MU-HQ-GF-01_Controlling**
 - ☐ **MU-HQ-BM_I**
 - ☐ **MU-HQ-BM_I-01_IT**
 - ☐ **MU-HQ-BM_I-02_ServerRoom**

! In the next wizard steps, systems are only displayed in the selection lists, if they have been assigned to one of the selected sites. If no site is selected, all systems of the selected company are listed.


✓ Company Selection: A company is selected.

Next Cancel


Fig. 10 - Assigning Location in the Wizard

The result of such an assignment, can be seen in the inventory tree, under the node Locations.

If now an evaluation of the respective location is to be accomplished, the sum of the used licenses can be determined in the Variance Analysis.



License Report



Site: MU-BranchOffice

Software Product: Microsoft Office

Publisher	
Version	
Metric	Standard license
Assignment Mode	No Assignment
Automatic Assignment	Yes

Licenses

License	License Type	License Valid until	Number	Software Maintenance
Microsoft Office 2013	Volume license	Valid Infinite	10	Software Assurance is unlimited

Found Software

Software	Publisher	Version
Name	Type	
Microsoft Office Professional Plus 2013	Microsoft Corporation	15.0.4569.1506
DSWS01	Workstation	

Found Installations

Name	Type
DSWS01	Workstation

Variance Analysis

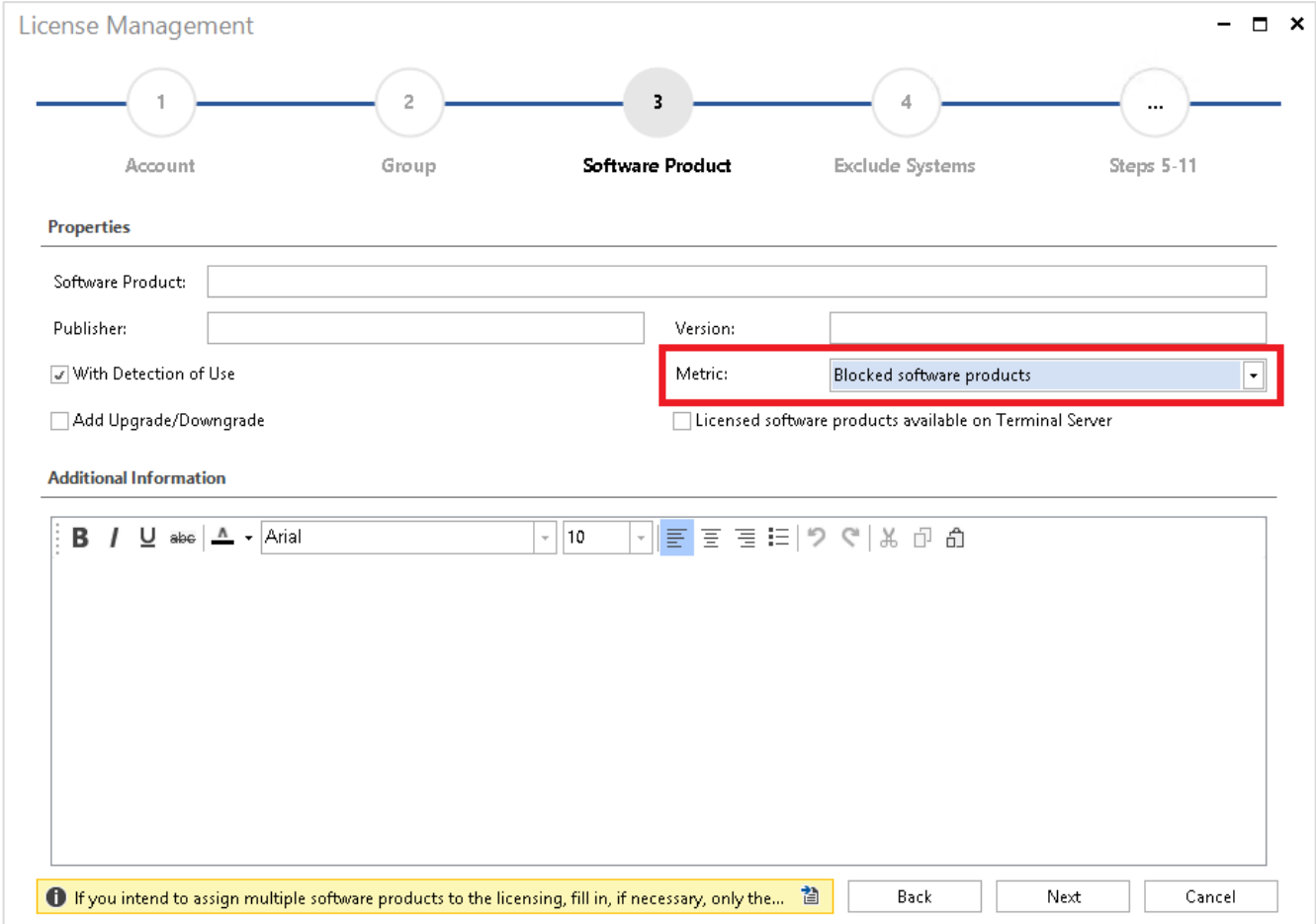
Available Licenses	10
Sites: MU-BranchOffice - In Use (assigned automatically)	1
In Use all Sites	1
Correction Value (manual)	0
Correction Upgrade / Downgrade Licenses	0
Total	9

Fig. 11 - Report for Site Evaluation

4.2 BLOCKED SOFTWARE PRODUCTS

In License Management, you can define software products as unwanted and use them to run evaluations.

To do this, start the wizard to create a license definition. In step 3 - **Software Product** - enter the appropriate information and select the metric **Blocked software products**.



License Management

1 Account 2 Group 3 **Software Product** 4 Exclude Systems ... Steps 5-11

Properties

Software Product:

Publisher: Version:


☒ With Detection of Use


☐ Add Upgrade/Downgrade

Metric: **Blocked software products**

☐ Licensed software products available on Terminal Server

Additional Information

B / **U** **abc** | **A** Arial | 10 | 



i If you intend to assign multiple software products to the licensing, fill in, if necessary, only the... 

Back Next Cancel

Fig. 12 - Unwanted Software Product with Usage Detection

The blocked software products are evaluated via the point **Undesired software products** in the data tree.

The software product marked as blocked and the associated systems, if the software is installed on it, can be viewed here.



Undesired Products Overview

Group: Blocked Software Products	
Software: Mozilla Firefox	
Publisher	
Version	
Metric	Blocked software products
Assignment Mode	No Assignment
No Automatic Assignment	No
Actual Installations	
Name	Type
DSEX01	Server
DSWS05	Workstation
NKNC3013	Workstation

Fig. 13 - Report for undesired software

4.3 EDIT UPGRADE / DOWNGRADE PATHS

Using an upgrade / downgrade path will help you mapping the following situation:

- You have several licenses of a product with version X (e.g. Windows 7)
- With these licenses, you are also entitled to use version Y (e.g. Windows 10).

Create the appropriate license definitions for both software products. Define the upgrade or downgrade path in the license definition for the software product Version X (Windows 7).

License Management

Steps 1-3 4 **5 Upgrade/Downgrade** 6 Steps 7-12

Upgrade

Product Name	Publisher	Version
<input type="checkbox"/> Microsoft SQL Server Express	Microsoft Corporation	
<input type="checkbox"/> Microsoft Visio 2013	Microsoft Corporation	
<input type="checkbox"/> Microsoft Visio 2016	Microsoft Corporation	
<input checked="" type="checkbox"/> Microsoft Windows 10 Enterprise	Microsoft Corporation	10.0.1
<input type="checkbox"/> Microsoft Windows 7 Enterprise	Microsoft Corporation	6.1.7601
<input type="checkbox"/> Microsoft Windows Server 2008 R2	Microsoft Corporation	6.1.7601
<input type="checkbox"/> Microsoft Windows Server 2012 R2	Microsoft Corporation	6.3.%
<input type="checkbox"/> Microsoft Windows Server 2016	Microsoft Corporation	
<input type="checkbox"/> Microsoft Windows Server 2019	Microsoft Corporation	10.0.17763

Downgrade

Product Name	Publisher	Version
<input type="checkbox"/> Microsoft SQL Server Express	Microsoft Corporation	
<input type="checkbox"/> Microsoft Visio 2013	Microsoft Corporation	
<input type="checkbox"/> Microsoft Visio 2016	Microsoft Corporation	
<input type="checkbox"/> Microsoft Windows 10 Enterprise	Microsoft Corporation	10.0.1
<input checked="" type="checkbox"/> Microsoft Windows 7 Enterprise	Microsoft Corporation	6.1.7601
<input type="checkbox"/> Microsoft Windows Server 2008 R2	Microsoft Corporation	6.1.7601
<input type="checkbox"/> Microsoft Windows Server 2012 R2	Microsoft Corporation	6.3.%
<input type="checkbox"/> Microsoft Windows Server 2016	Microsoft Corporation	
<input type="checkbox"/> Microsoft Windows Server 2019	Microsoft Corporation	10.0.17763

Back Next Cancel

Fig. 14 - Upgrade / Downgrade Path

If you now perform a license analysis for the software product with version Y (Windows 10), you will recognize correction values from Upgrade / Downgrade.

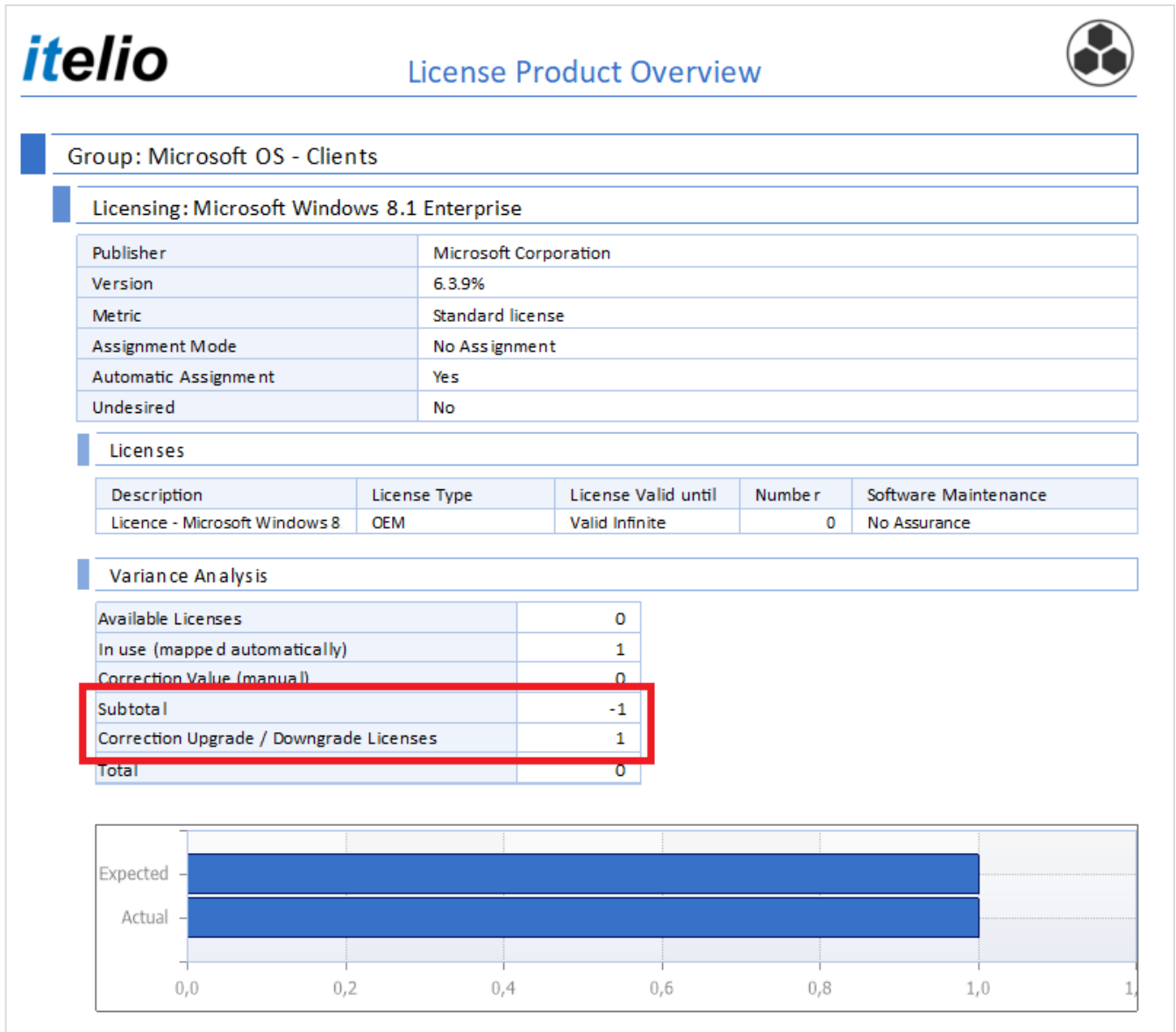


Fig.15 - Correction Value Upgrade / Downgrade

5. CARRY OUT LICENSE ANALYSES

After the data has been entered in License Management, a corresponding evaluation should take place. There are various options available to do this.

- Evaluation at company level
- Evaluation at group level
- Evaluation at software product level
- Evaluation at site level

The evaluation of the data at company level takes into account all groups, locations and software products. The corresponding reports can be found in the inventory tree below the **Reports** node.

In terms of content, these reports describe a license analysis as a variance analysis. For example, the sum of the used licenses can be determined and a corresponding evaluation can be provided automatically. Here the representation differs in different form.

In the following example, an evaluation was carried out for the product **Microsoft Office 2013**. There you can see that one of ten existing licenses is in use. Thus a sum can be determined in tabular form and an additional representation in the form of a bar chart.

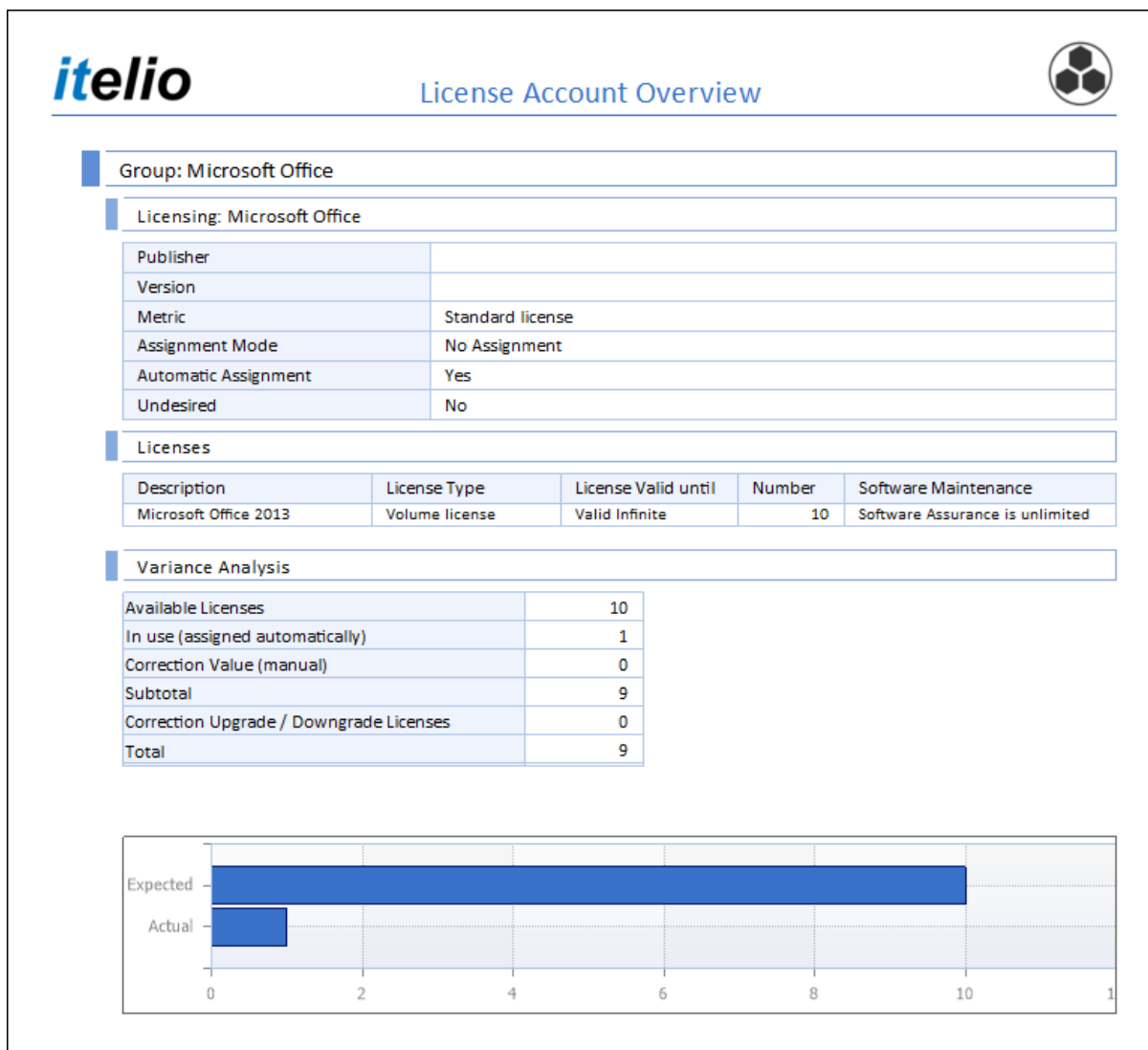


Fig. 16 - Company Evaluation Report

You can also output results for individual groups. To do this, select the respective group and select the Reports node again.

Below each group, three standard reports are available. Here, too, a license analysis is to be output as the result as a variance analysis.

In the following example, an evaluation was performed for the **Microsoft SQL Server** group created. You can see that licenses for the different SQL Server editions are evaluated in this group. The total number of licenses used was formed. In order to make the display clearer, a bar chart is also displayed which shows the excess licenses (green bar) and the missing licenses (red bar).

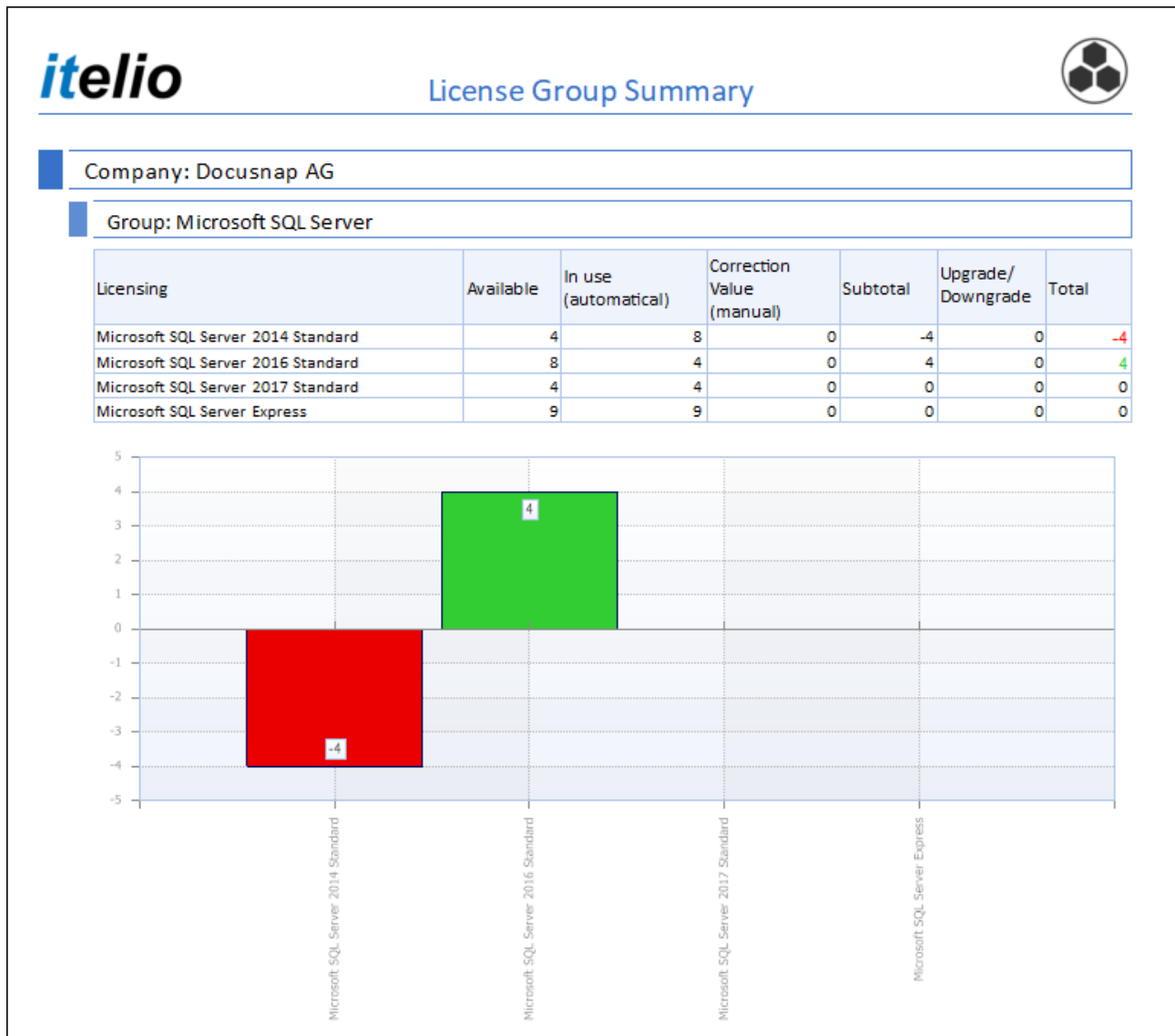


Fig. 17 - Report for Group Evaluation

5.1 CREATE AND SEND REPORTS ON A SCHEDULED BASIS

Every report in Docusnap can be scheduled and sent as an e-mail. In this way, you can have the license analyses from Docusnap sent to you regularly by e-mail.

When you create a report, another tab called **Reporting** appears in the menu bar, providing actions related to the report. The **Schedule as Job** function opens the Scheduled Report Wizard.

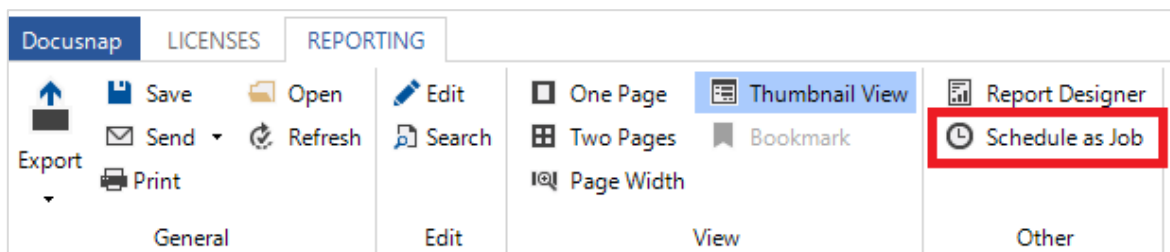


Fig. 18 - Plan Report as Order

A desired path can be stored to store this document. Furthermore, in step 2 - **Report** - e-mail data can be stored for automated sending.

Attention: Please note that this requires the e-mail configurations of the Docusnap Server service.

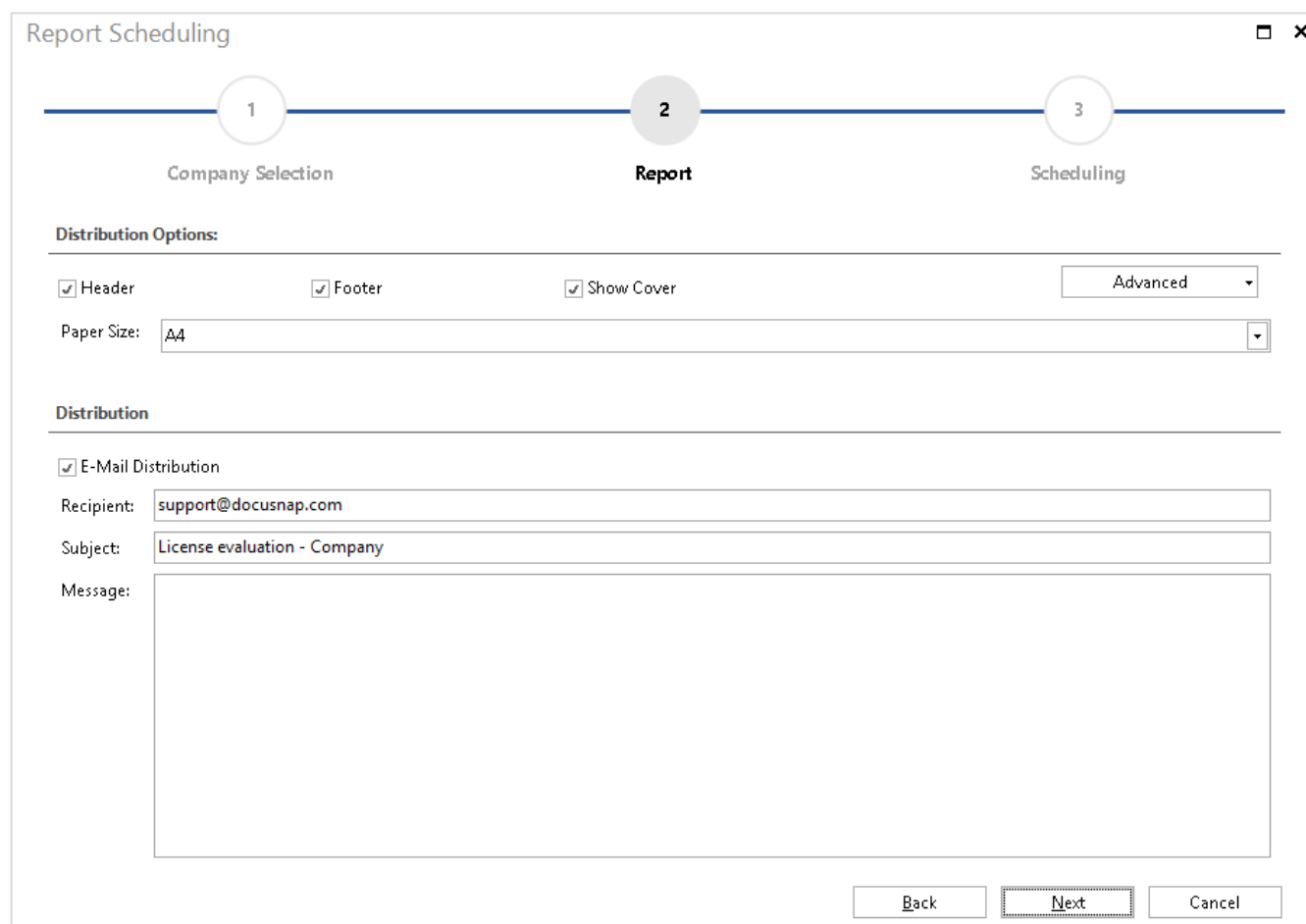

 The image shows the 'Report Scheduling' wizard window. At the top, there is a progress bar with three steps: 1. Company Selection, 2. Report (current step), and 3. Scheduling. Below the progress bar, the 'Distribution Options' section includes checkboxes for 'Header', 'Footer', and 'Show Cover', all of which are checked. There is a 'Paper Size' dropdown menu set to 'A4' and an 'Advanced' dropdown menu. The 'Distribution' section includes a checkbox for 'E-Mail Distribution', which is checked. Below this, there are input fields for 'Recipient' (support@docusnap.com), 'Subject' (License evaluation - Company), and a large text area for 'Message'. At the bottom right, there are three buttons: 'Back', 'Next' (highlighted with a dashed border), and 'Cancel'.

Fig.19 - Automated Reporting

6. ASSIGNMENT WIZARD / SOFTWARE LIST

The Assignment Wizard provides you with additional functions for software and license management. If you can use the License Management Wizard to map only license definitions and thus software that is subject to license, you can use the Assignment Wizard to also define software that is not subject to license and unwanted software.

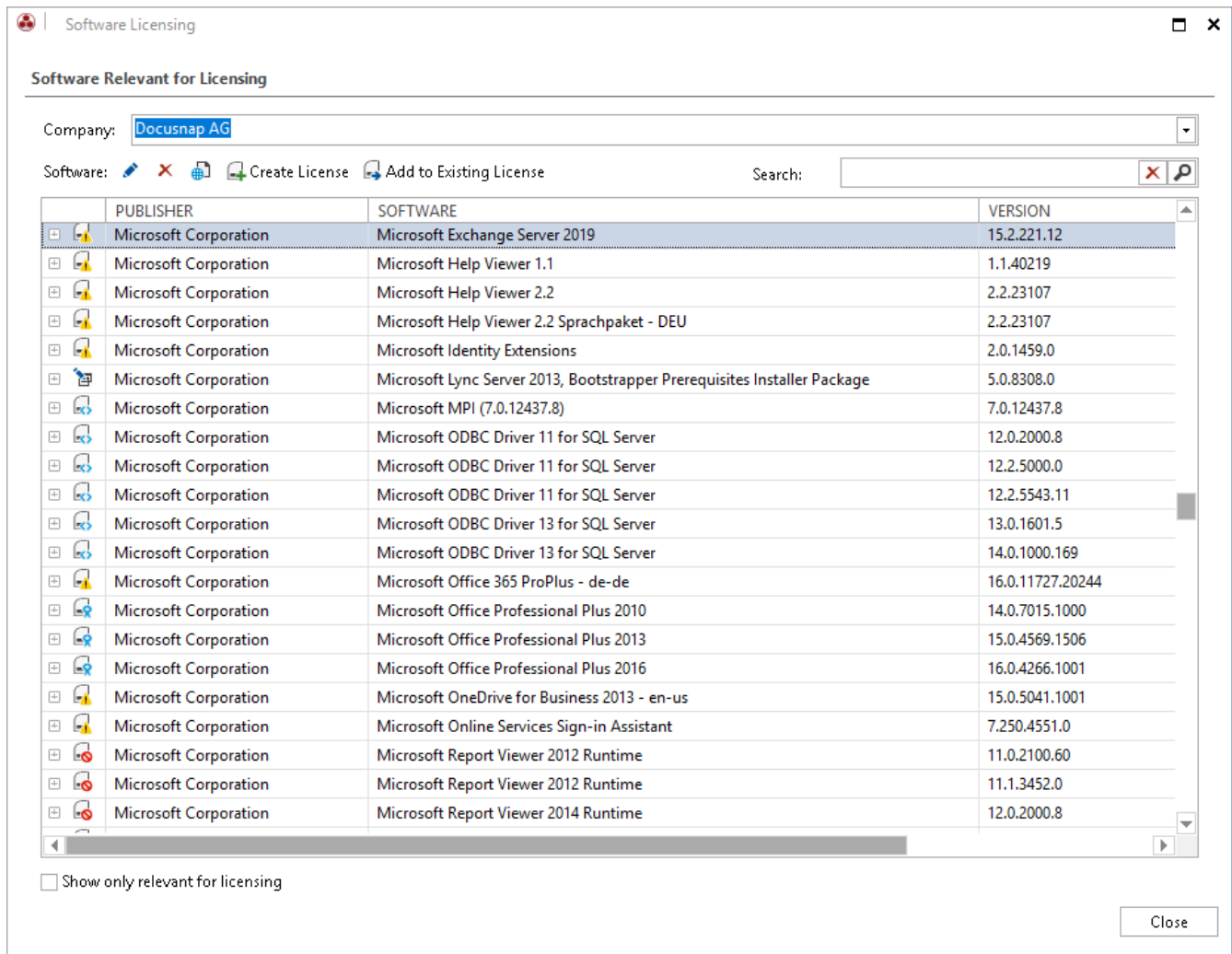


Fig. 20 - The Assignment Wizard

When you open the Assignment Wizard, all software products ever inventoried that are unprocessed/undefined are listed first. The intention now is for you to go through this entire list and define the software products accordingly - as not subject to licensing, subject to licensing and unwanted. The definition as requiring a license takes place by creating a license definition. If a software product has been defined, it is hidden from the list. If all software products have been defined, the list is empty.

As you can see from the previous illustration, you will find software products with different icons there. Depending on how the software product was defined, it receives a different icon. Defined software products are displayed again via the deactivated option **Show only relevant for licensing**.

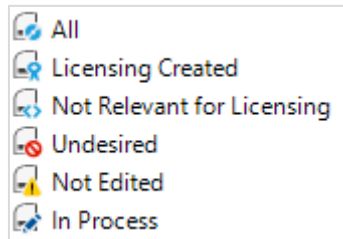


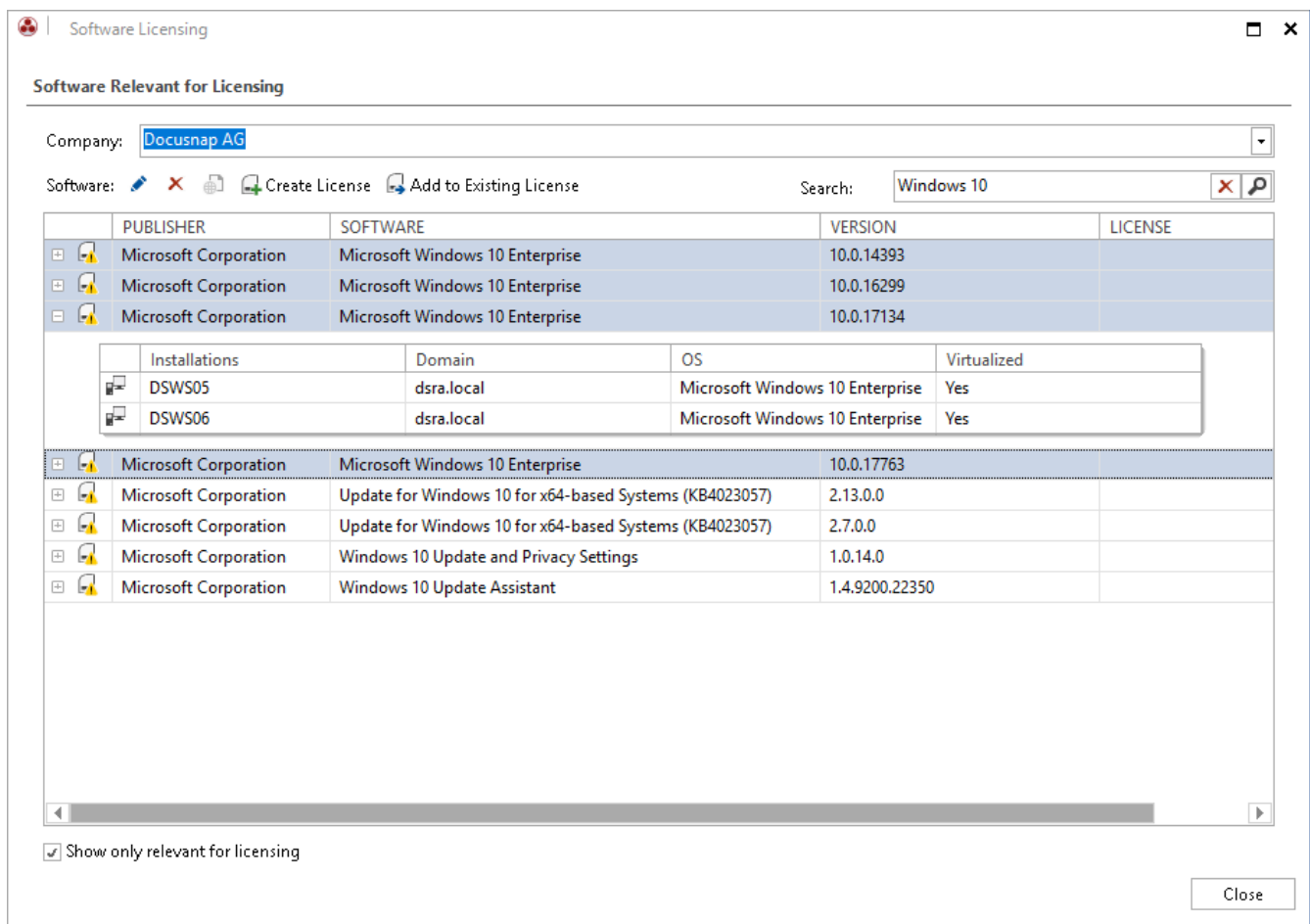
Fig.21 - Icon Overview

6.1 CREATE LICENSE DEFINITION

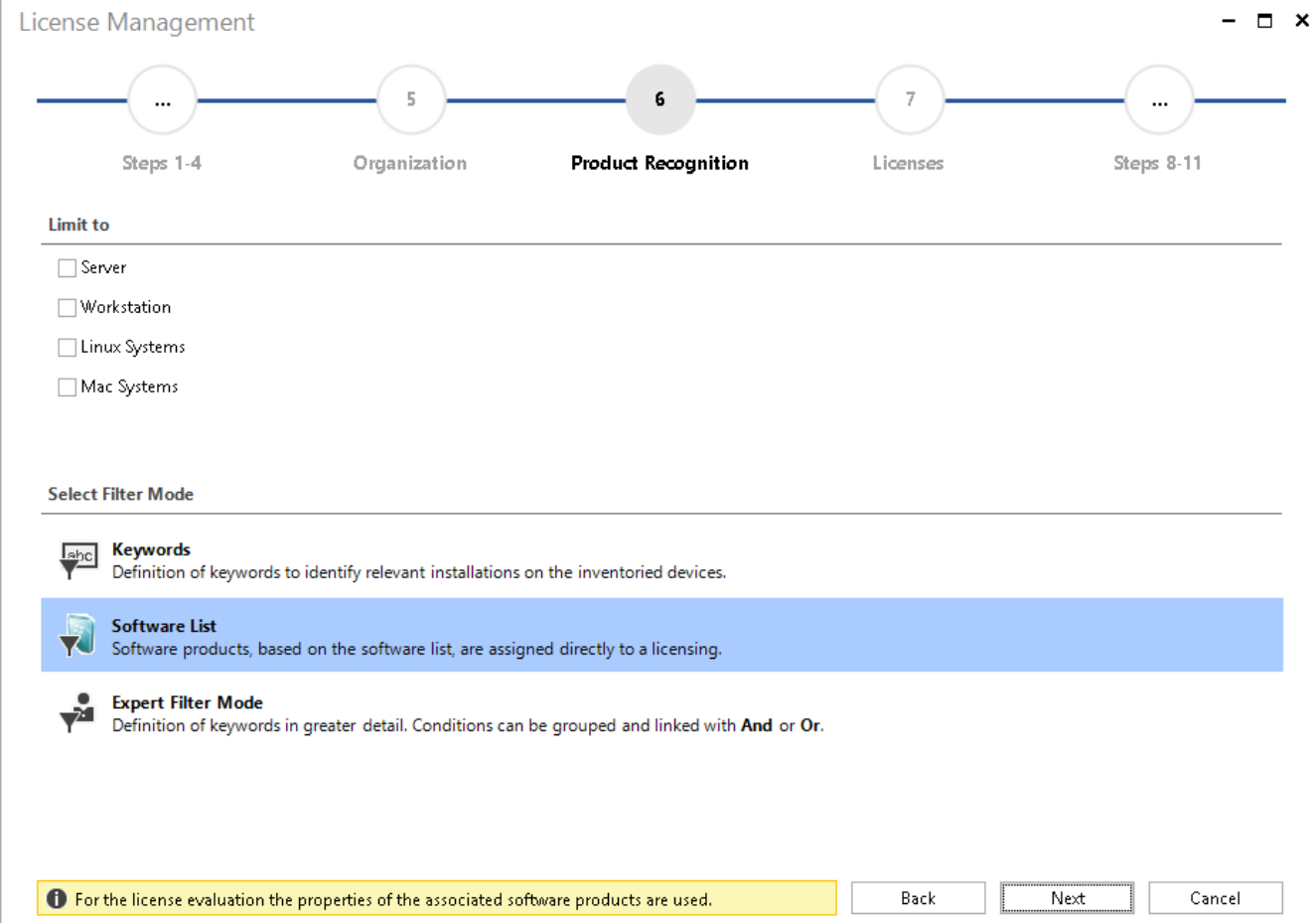
To create a new license definition from the Assignment Wizard, first search for the corresponding product(s) in the search field and then select them.

Within the Assignment Wizard, all software products are also differentiated according to their version. For this reason, you must select all available versions. The license definition is then created using the **Create License** control.

Please note that after installing a new version, an already edited software product will be listed again in the higher version - e.g. Windows 10 - Version 10.0.17800.



Please note the step - Product Recognition. A selection via the software list has already been made here. This step was done at the beginning, with the search and selection of the software product.




License Management


Steps 1-4 5 Organization **6 Product Recognition** 7 Licenses Steps 8-11


Limit to

- ☐ Server
- ☐ Workstation
- ☐ Linux Systems
- ☐ Mac Systems

Select Filter Mode

 **Keywords**
Definition of keywords to identify relevant installations on the inventoried devices.

 **Software List**
Software products, based on the software list, are assigned directly to a licensing.

 **Expert Filter Mode**
Definition of keywords in greater detail. Conditions can be grouped and linked with **And** or **Or**.

i For the license evaluation the properties of the associated software products are used.

Back **Next** Cancel

Fig. 23 - Predefined Selection of Software List

After the license definition has been created, you will see the name of the previously created license definition in the License column.

Please note that this assignment is only carried out if the software list has been selected in the product recognition step!









	PUBLISHER	SOFTWARE	VERSION	LICENSE
	 Microsoft Corporation	Microsoft Windows 10 Enterprise	10.0.14393	Microsoft Windows 10 Enterprise
	 Microsoft Corporation	Microsoft Windows 10 Enterprise	10.0.16299	Microsoft Windows 10 Enterprise
	 Microsoft Corporation	Microsoft Windows 10 Enterprise	10.0.17134	Microsoft Windows 10 Enterprise
	 Microsoft Corporation	Microsoft Windows 10 Enterprise	10.0.17763	Microsoft Windows 10 Enterprise

Fig. 24 - Linking the Software Product to the License Definition

6.2 ADD TO EXISTING LICENSE

In the previous section it was described that after installing a new version of an already defined software product, this new version will be found again in the list of unedited software products. The following figure shows this using Microsoft Windows 10 Enterprise Version 10.0.17763 as an example.

You can now define this entry using the **Add to Existing License** control. After selecting the control, a new window opens with a preselected keyword. If necessary, adjust the search word, select the corresponding license and confirm with OK. The software product is then defined.

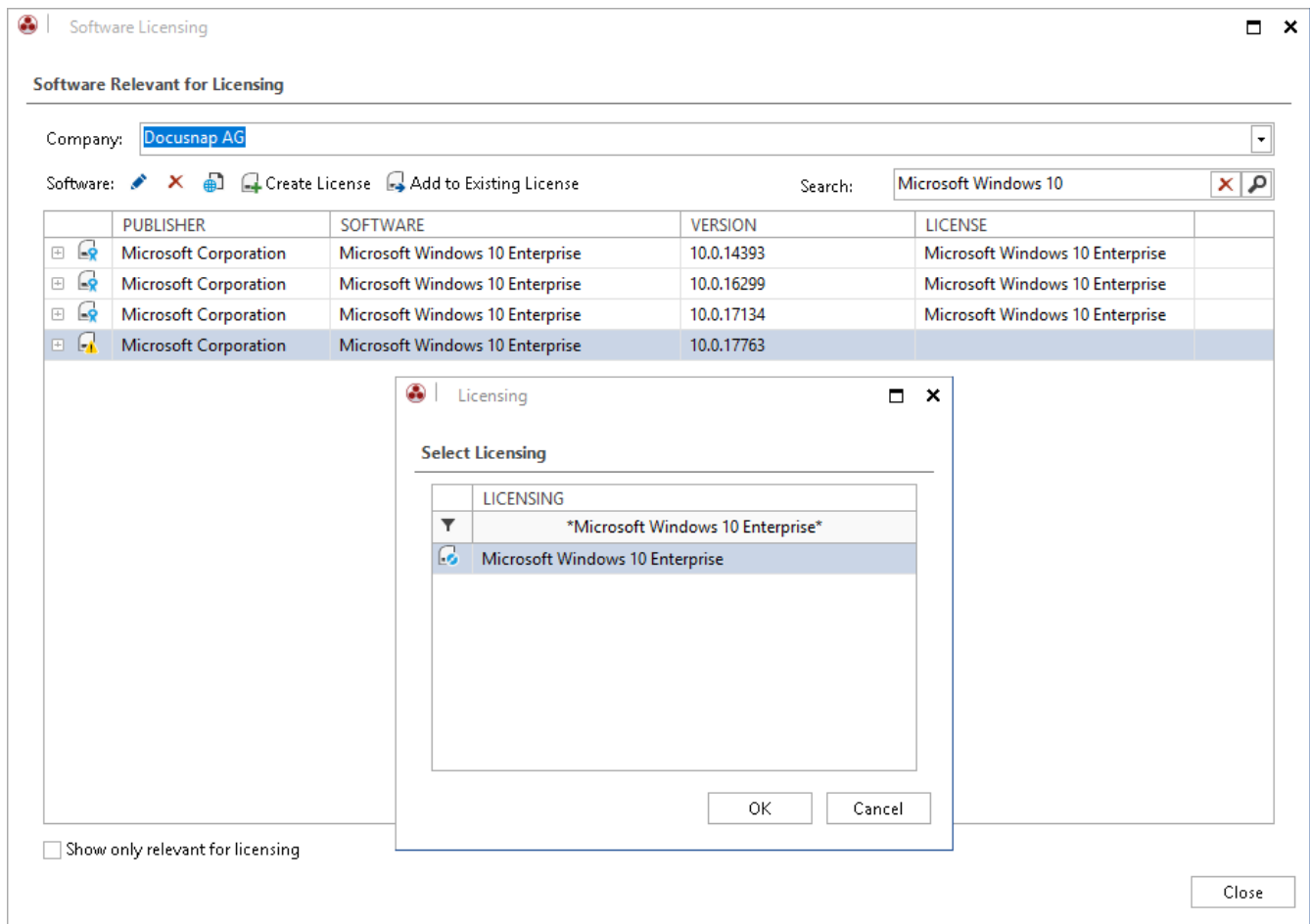


Fig. 25 - New Version of Software Product Found

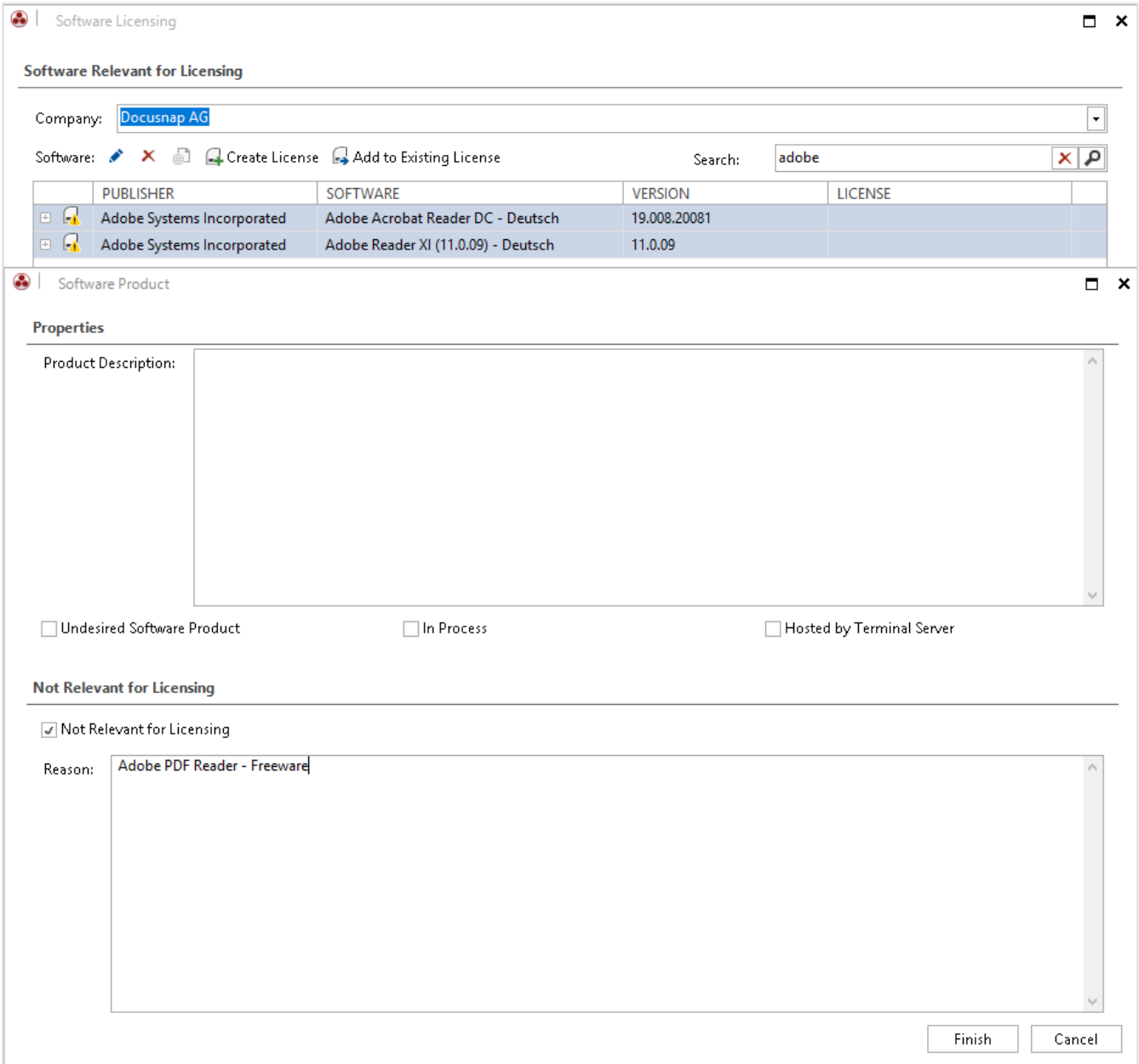
6.3 UNLICENSED SOFTWARE / IN PROCESSING / UNWANTED

As mentioned earlier, you can also use the Assignment Wizard to define software that is not relevant for licensing.

To perform this action, find the software product(s) again, select them, and click the **pen control** (Edit):

A new window will open. You can now perform the following actions in this window:

- Store **Product Description** - serves as information
- Define as **Undesired Software Product**
- Mark as **In Process** to keep colleagues informed
- **Hosted by Terminal Server** - serves as information
- **Not relevant for licensing** - the reason is a mandatory field



The screenshot shows two overlapping windows from the Docusnap application.

The top window, titled "Software Licensing", has a tab "Software Relevant for Licensing". It displays a search for "adobe" and a table of results:

	PUBLISHER	SOFTWARE	VERSION	LICENSE
	Adobe Systems Incorporated	Adobe Acrobat Reader DC - Deutsch	19.008.20081	
	Adobe Systems Incorporated	Adobe Reader XI (11.0.09) - Deutsch	11.0.09	

The bottom window, titled "Software Product", has a tab "Properties". It contains a large text area for "Product Description". Below this are three checkboxes: "Undesired Software Product", "In Process", and "Hosted by Terminal Server".

Below the checkboxes is a section titled "Not Relevant for Licensing". The checkbox "Not Relevant for Licensing" is checked. Below this is a "Reason:" label followed by a text area containing "Adobe PDF Reader - Freeware".

At the bottom right of the "Software Product" window are "Finish" and "Cancel" buttons.

Fig.26 - Defining Software Products Elsewhere

7. FURTHER TOPICS

7.1 IMPORT / EXPORT

You can use the import/export function to export your existing license definitions to an external file. This enables all selected definitions to be available in another database. In this way, you can also make the license definitions available to third parties, such as customers. You will find the **Import / Export** function in the License Management ribbon.

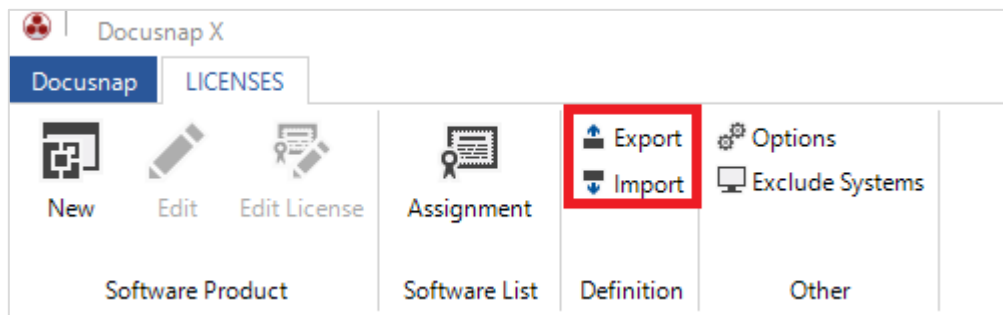
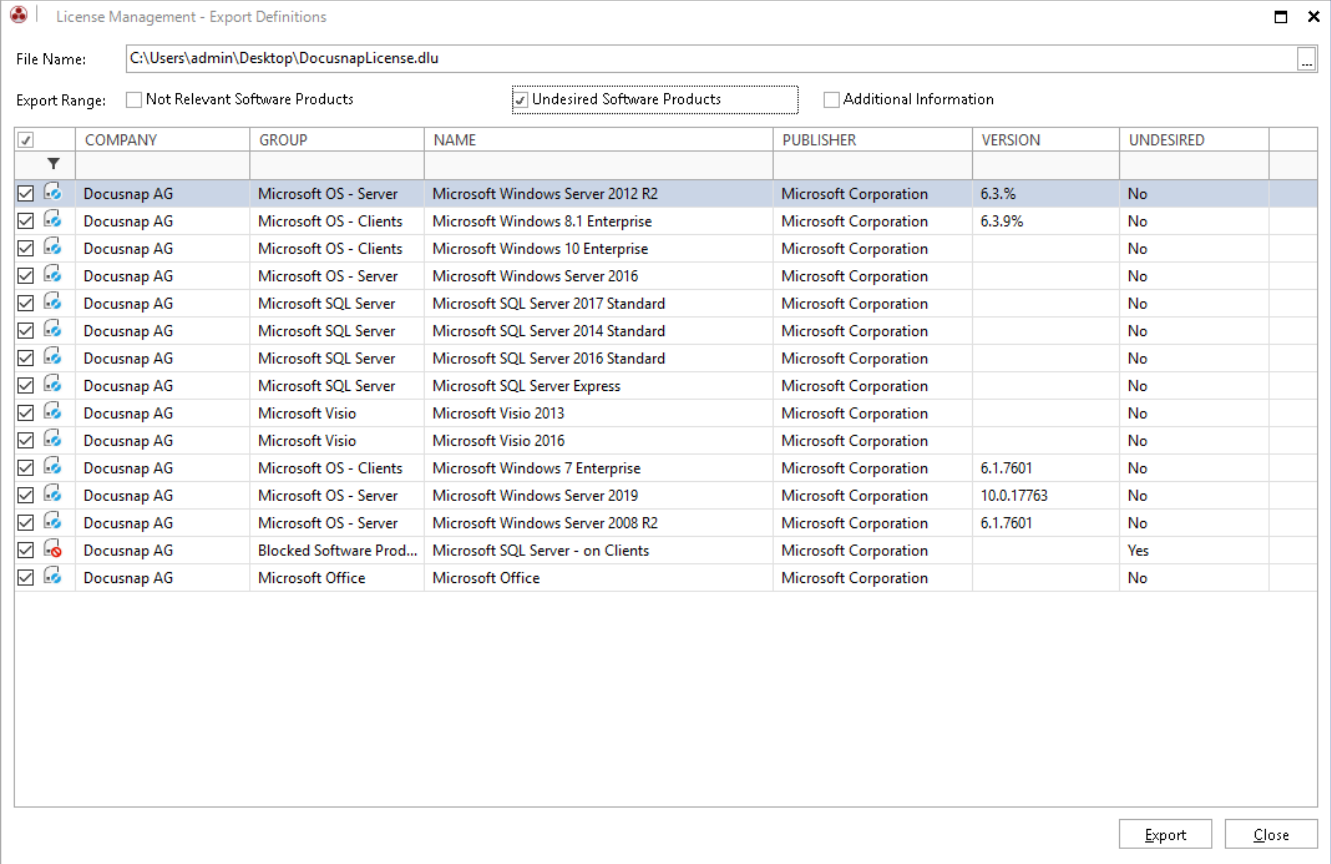


Fig. 27 - Licenses - Import / Export

7.1.1 Export

Export opens the assistant for the export. Within this dialog it is possible to select the license definitions to be exported.



License Management - Export Definitions

File Name: C:\Users\admin\Desktop\DocusnapLicense.dlu

Export Range: ☐ Not Relevant Software Products ☒ Undesired Software Products ☐ Additional Information

<input checked="" type="checkbox"/>	COMPANY	GROUP	NAME	PUBLISHER	VERSION	UNDESIRE
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft OS - Server	Microsoft Windows Server 2012 R2	Microsoft Corporation	6.3.9%	No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft OS - Clients	Microsoft Windows 8.1 Enterprise	Microsoft Corporation	6.3.9%	No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft OS - Clients	Microsoft Windows 10 Enterprise	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft OS - Server	Microsoft Windows Server 2016	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft SQL Server	Microsoft SQL Server 2017 Standard	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft SQL Server	Microsoft SQL Server 2014 Standard	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft SQL Server	Microsoft SQL Server 2016 Standard	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft SQL Server	Microsoft SQL Server Express	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft Visio	Microsoft Visio 2013	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft Visio	Microsoft Visio 2016	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft OS - Clients	Microsoft Windows 7 Enterprise	Microsoft Corporation	6.1.7601	No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft OS - Server	Microsoft Windows Server 2019	Microsoft Corporation	10.0.17763	No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft OS - Server	Microsoft Windows Server 2008 R2	Microsoft Corporation	6.1.7601	No
<input checked="" type="checkbox"/>	Docusnap AG	Blocked Software Prod...	Microsoft SQL Server - on Clients	Microsoft Corporation		Yes
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft Office	Microsoft Office	Microsoft Corporation		No

Export Close

Fig. 28 - Exporting Definitions

After specifying the file name and the storage location, the export scope is determined. Here you can specify which license definitions are to be exported. You can also export software products that are not relevant for licensing or are undesired.

Please note that no additional information is exported if the **Additional Information** checkbox is active. These must be exported separately. Only an assignment of the additional information is exported. However, these must first be available in the import database.

7.1.2 Import

You can use the Import function to import the previously exported data.

License Management - Import Definitions

File Name:

Target Company:

Import Range:

- ☒ Product Info
- ☒ Notes on the Software Products
- ☒ Update Path
- ☒ Licenses
- ☒ Additional Information
- ☐ Not Relevant Software Products
- ☐ Product Recognition
- ☐ Undesired Software Products

<input checked="" type="checkbox"/>	GROUP	NAME	PUBLISHER	VERSION	UNDESIRED
<input checked="" type="checkbox"/>	Blocked Software Products	Microsoft SQL Server - on Clients	Microsoft Corporation		Yes
<input checked="" type="checkbox"/>	Microsoft Office	Microsoft Office	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Microsoft OS - Clients	Microsoft Windows 8.1 Enterprise	Microsoft Corporation	6.3.9%	No
<input checked="" type="checkbox"/>	Microsoft OS - Clients	Microsoft Windows 10 Enterprise	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Microsoft OS - Clients	Microsoft Windows 7 Enterprise	Microsoft Corporation	6.1.7601	No
<input checked="" type="checkbox"/>	Microsoft OS - Server	Microsoft Windows Server 2012 R2	Microsoft Corporation	6.3.3%	No
<input checked="" type="checkbox"/>	Microsoft OS - Server	Microsoft Windows Server 2016	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Microsoft OS - Server	Microsoft Windows Server 2019	Microsoft Corporation	10.0.17763	No
<input checked="" type="checkbox"/>	Microsoft OS - Server	Microsoft Windows Server 2008 R2	Microsoft Corporation	6.1.7601	No
<input checked="" type="checkbox"/>	Microsoft SQL Server	Microsoft SQL Server 2017 Standard	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Microsoft SQL Server	Microsoft SQL Server 2014 Standard	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Microsoft SQL Server	Microsoft SQL Server 2016 Standard	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Microsoft SQL Server	Microsoft SQL Server Express	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Microsoft Visio	Microsoft Visio 2013	Microsoft Corporation		No
<input checked="" type="checkbox"/>	Microsoft Visio	Microsoft Visio 2016	Microsoft Corporation		No

Fig. 29 - Importing Definitions

By selecting the target company, you can transfer license definitions that have already been created from an existing client to other clients.

You use the import scope to define which information is to be transferred from the import file. You can deselect or select individual license definitions using the checkboxes within the data grid.

7.2 EXCLUDE SYSTEMS / EXCLUDE FROM LICENSE MANAGEMENT

Docusnap offers you the possibility to specifically exclude systems from license management. As soon as a system is excluded, it is not taken into account when calculating the actual state.

A distinction is made between exclusion from a single license definition and complete exclusion.

The complete exclusion from the license management can be done via the editor of a system. Select the desired system in the inventory data tree and open the editor. If the **Exclude from License Management** checkbox is selected, the system is no longer taken into account in license management.

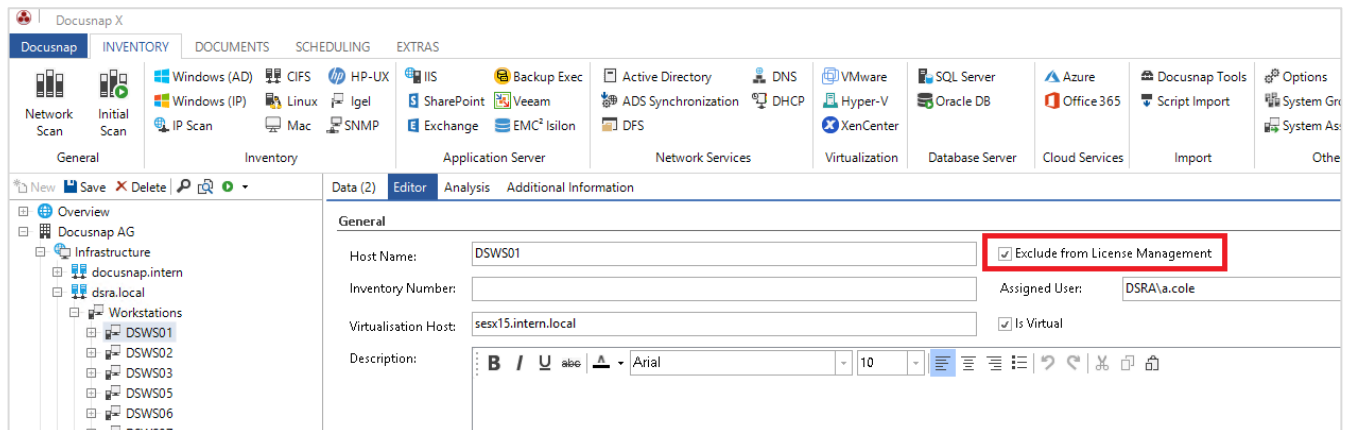


Fig. 30 - Excluding the System from License Management

It is also possible to exclude systems via the license management options. Within the license management you will find the button **Exclude Systems** in the menu bar. In this window you can select several systems and thus exclude them from license management.

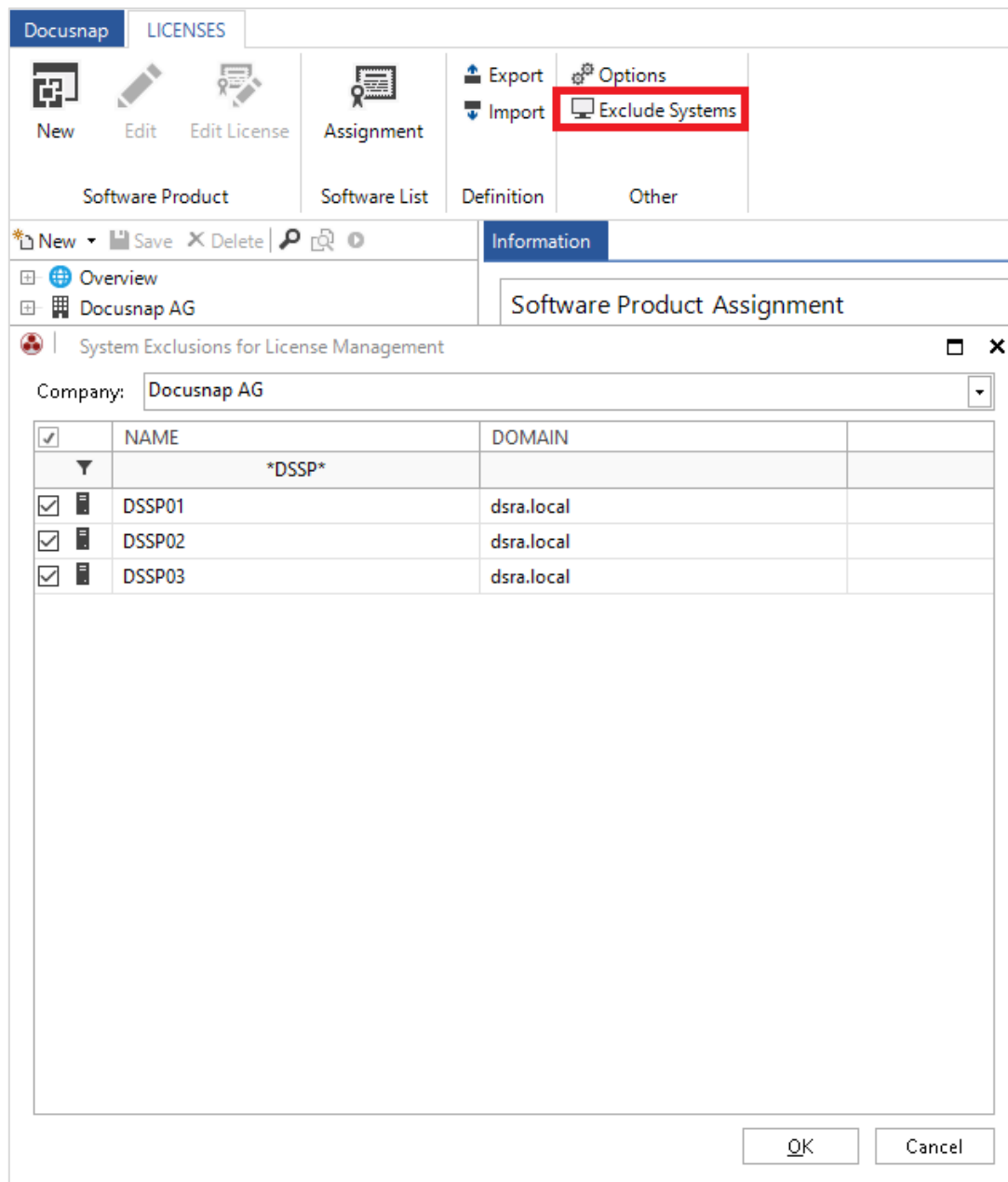
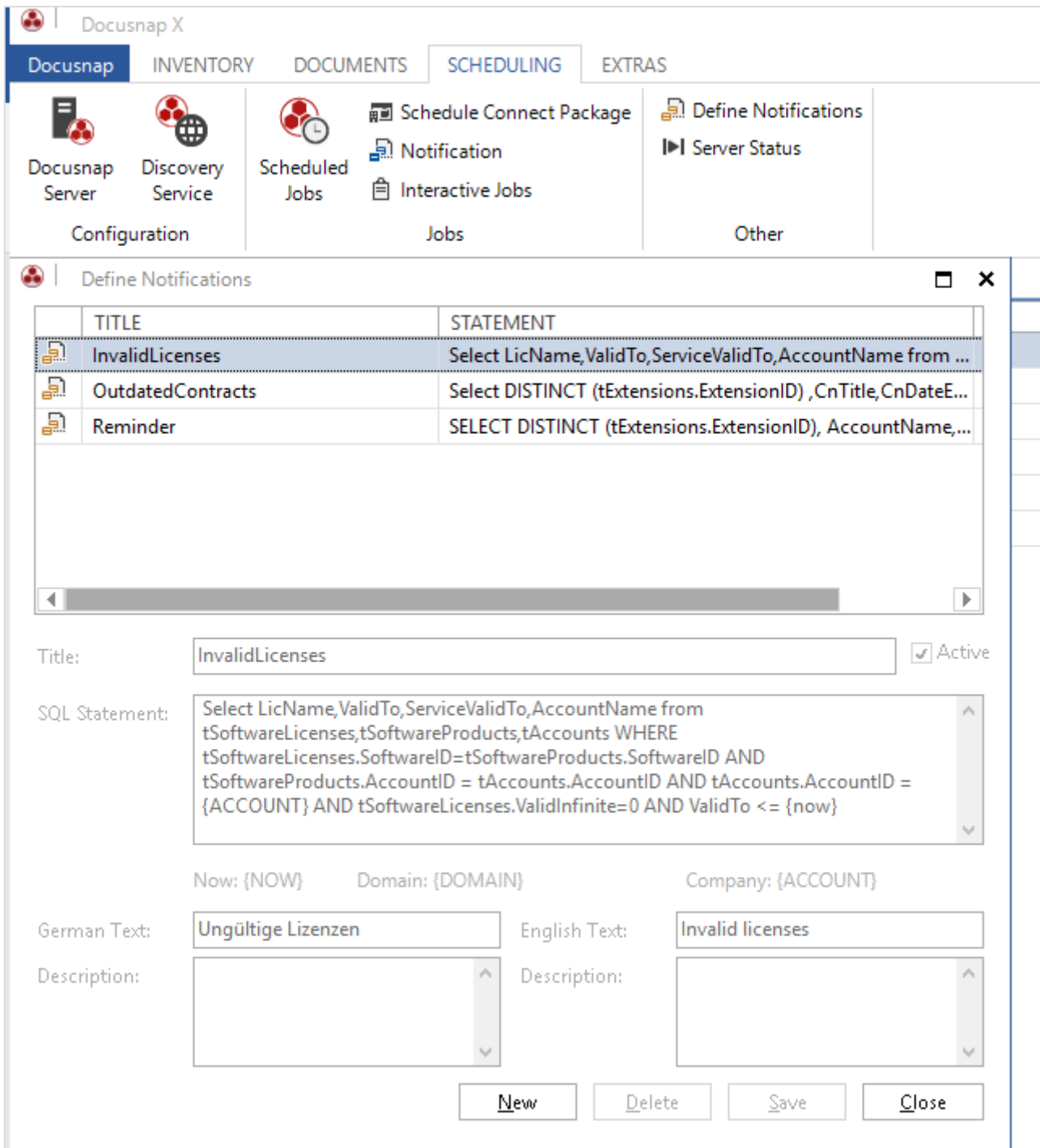


Fig. 31 - Exclusion of Multiple Systems from License Management




7.3 MESSAGE DEFINITIONS

Within a license it is possible to store a validity as well as information about the software maintenance. If these date fields are maintained, Docusnap can use a message definition to send notifications in the form of e-mails with e.g. expiring licenses.

A predefined message definition "InvalidLicenses" can already be found in the standard version within the message definitions.



The screenshot shows the 'Docusnap X' application interface. The 'SCHEDULING' tab is active, and the 'Define Notifications' sub-tab is selected. A table lists predefined message definitions:

	TITLE	STATEMENT
	InvalidLicenses	Select LicName,ValidTo,ServiceValidTo,AccountName from ...
	OutdatedContracts	Select DISTINCT (tExtensions.ExtensionID) ,CnTitle,CnDateE...
	Reminder	SELECT DISTINCT (tExtensions.ExtensionID), AccountName,...

Below the table, the details for the 'InvalidLicenses' definition are shown:

Title: ☒ Active

SQL Statement:

Now: {NOW} Domain: {DOMAIN} Company: {ACCOUNT}

German Text: English Text:

Description: Description:

Buttons:

Fig. 32 - Message Definition InvalidLicenses

Please note that this message definition outputs all licenses that have already expired. If you want to be notified in advance about an appropriate period of time, the SQL statement must be adjusted accordingly. Finished queries can be found on our website in the Knowledge Base within the HowTo "Defining Notifications".

8. APPLICATION EXAMPLES

The following application examples describe three scenarios, which are frequently requested from Docusnap Support. On the one hand, it is the creation of user licenses, especially CALs. A further application example is to map datacenter licenses - on the one hand the host licenses, on the other hand the VMs that can be operated by them.

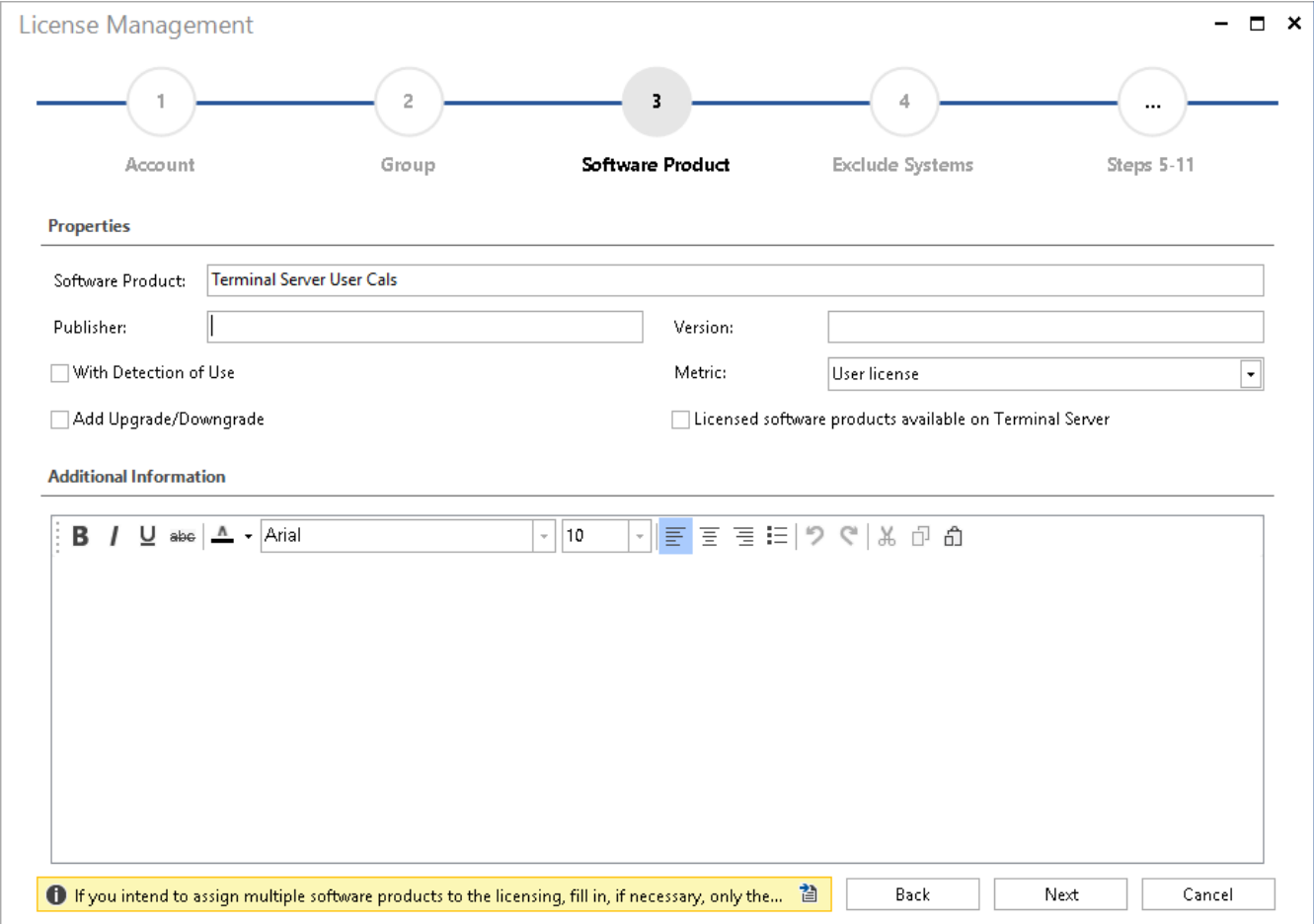
8.1 USER LICENSES – E.G. TERMINAL SERVER USER CALS

For example, a user license can map access to a terminal server through a selection of users. Let's start by creating the license definition by launching the License Management Wizard from the **New** control.

Select your company and possibly locations as well as an already existing group or create a new one.

In step 3 - **Software Product** - enter the name, deactivate the checkbox at With Detection of Use and select the User license as metric.

You deactivate the usage detection, because at this moment not the number of installations is relevant, but the number of users.



License Management

1 Account 2 Group 3 **Software Product** 4 Exclude Systems ... Steps 5-11

Properties

Software Product:

Publisher:

Version:

☐ With Detection of Use


Metric:

☐ Add Upgrade/Downgrade

☐ Licensed software products available on Terminal Server

Additional Information

B / **U** **abc** **A** Arial 10

i If you intend to assign multiple software products to the licensing, fill in, if necessary, only the... 

Back Next Cancel

Fig. 33 - Step 3 - Terminal Server User Cals

In step 6 - Licenses - you now deposit the purchased User Cals.

In step 7 - User Assignments - you can now assign groups and/or AD users to the license. For the assignment, select the users/groups, then the license, and finally the Add control.

If you add groups, you will be asked for the type of resolution. To create a dynamic license definition, select the option: **Resolve group recursively when creating the report**.

If you perform a license analysis in the future, the selected group will be recursively resolved at the time the report is created - based on the last ADS inventory.

The direct resolving of groups, or adding of individual users, leads to a static list, which must be adjusted regularly.

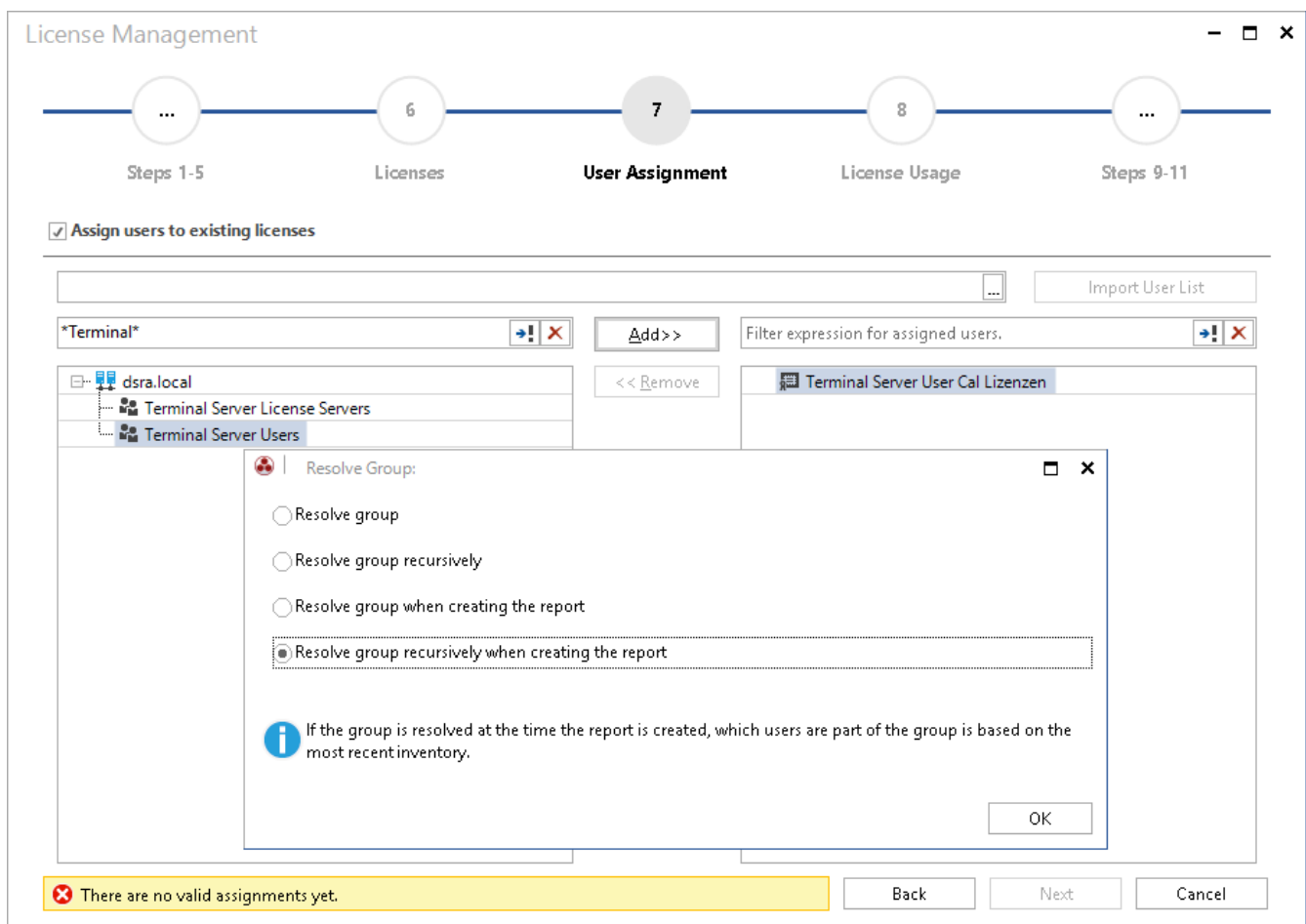


Fig. 34 - Step 7 - Terminal Server User Cals - User Assignment

8.2 DATACENTER LICENSES

A datacenter license is divided into the mapping of the host licenses and the VMs running on the hosts. First the creation of the **Datacenter Host** license is described. You can use it to map the purchased datacenter licenses.

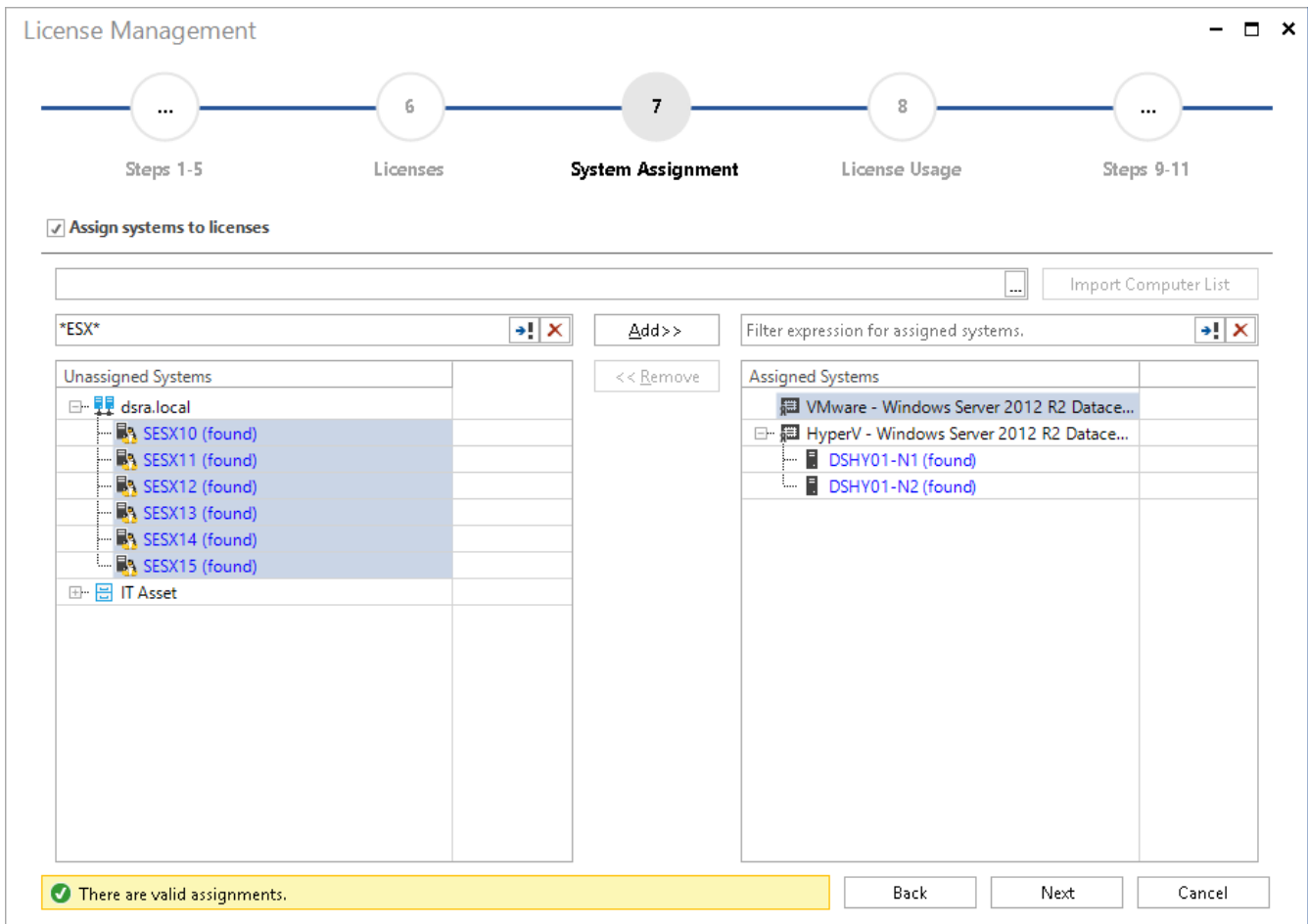
Start the license management wizard, select your company and possibly locations as well as an already existing group or create a new one.

In step 3 - **Software Product** - enter the name, deactivate the checkbox at With Detection of Use and select the Device license as metric.

In step 6 - **Licenses** - you now deposit the purchased Datacenter licenses.

In step 7 - **Device Assignments** - you can now add the virtual host systems to the license(s).

This device mapping is a static mapping that you should repeat when new virtual hosts are deployed.



License Management

Steps 1-5 6 Licenses **7 System Assignment** 8 License Usage Steps 9-11

☒ Assign systems to licenses

ESX

Unassigned Systems

- dsra.local
 - SESX10 (found)
 - SESX11 (found)
 - SESX12 (found)
 - SESX13 (found)
 - SESX14 (found)
 - SESX15 (found)
 - IT Asset

Assigned Systems

- VMware - Windows Server 2012 R2 Datacenter
 - DSHY01-N1 (found)
 - DSHY01-N2 (found)
- HyperV - Windows Server 2012 R2 Datacenter
 - DSHY01-N1 (found)
 - DSHY01-N2 (found)

There are valid assignments.

Back Next Cancel

Fig. 35 - Step 7 - Datacenter - Virtual Host Assignment

To map the virtual systems that are running on the virtual host systems and therefore fall under the Datacenter License, also start the License Management Wizard.

Here you can also select your company and possibly locations as well as an already existing group or create a new one.

In step 3 - **Software Product** - you deposit the name and otherwise do no further adjustment. The detection of use remains active and the metric remains on the standard license.

In step 4 - **Exclude Systems** - now exclude all **physical server systems** from the analysis within the license definition. Within this license definition only the virtual systems should be considered.

License Management

...

3

4

5

...

Steps 1-2
Software Product
Exclude Systems
Organization
Steps 6-11

Exclude Systems

<input checked="" type="checkbox"/>	NAME	DOMAIN	
	ESX,*DSHY*		
<input checked="" type="checkbox"/>	SESX11	dsra.local	
<input checked="" type="checkbox"/>	SESX12	dsra.local	
<input checked="" type="checkbox"/>	SESX10	dsra.local	
<input checked="" type="checkbox"/>	SESX15	dsra.local	
<input checked="" type="checkbox"/>	SESX14	dsra.local	
<input checked="" type="checkbox"/>	SESX13	dsra.local	
<input checked="" type="checkbox"/>	DSHY01-N1	dsra.local	
<input checked="" type="checkbox"/>	DSHY01-N2	dsra.local	

Back
Next
Cancel

Fig. 36 - Excluding Physical Server Systems

In step 6 - **Product Detection** - select the filter mode you are using, Software list or Keywords / Advanced filter mode. Within the mode you filter to the corresponding Microsoft Server operating systems.

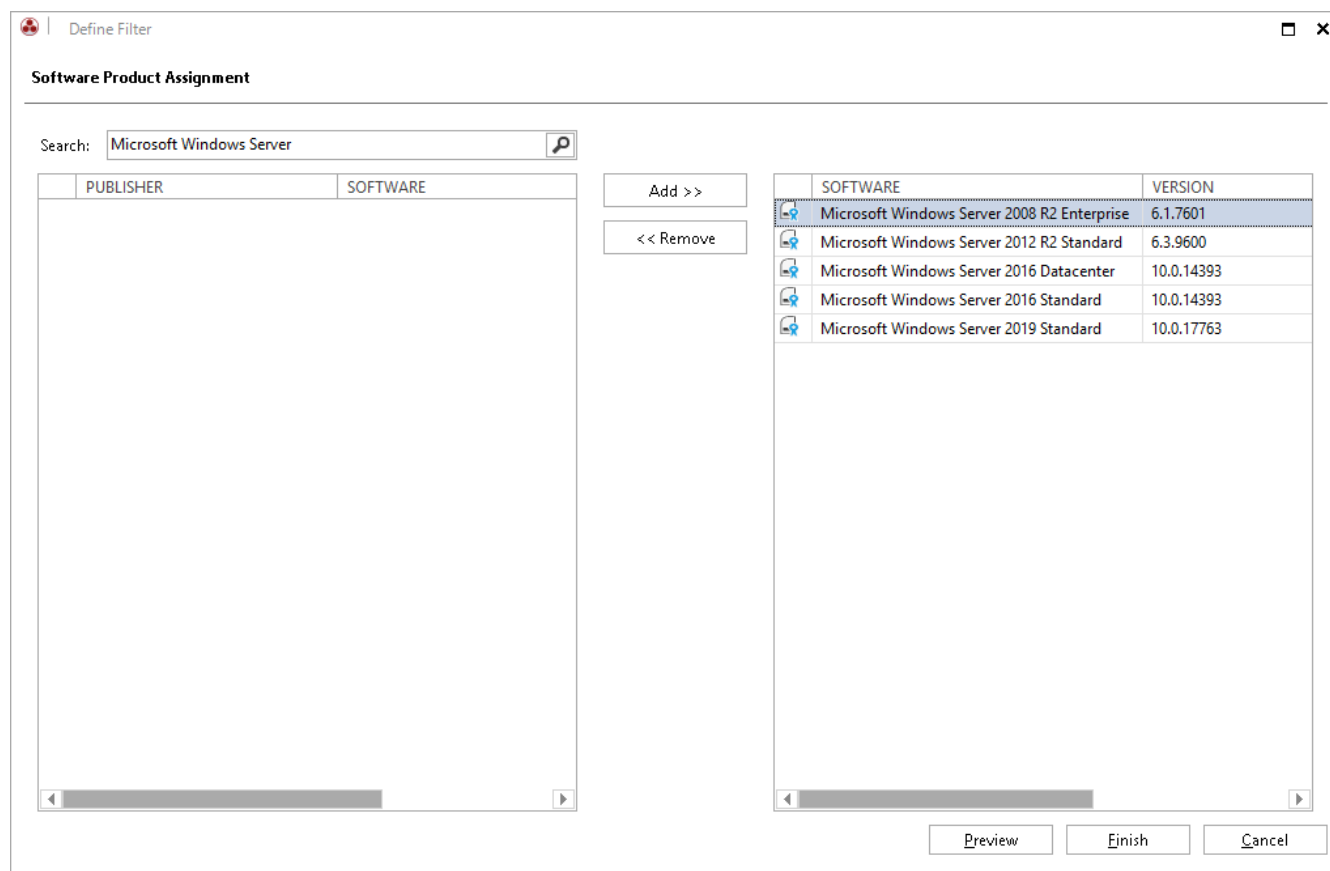


Fig. 37 - Using the Software List as a Filter Modeus

In step 7 - **Licenses** - create a license whose purchased licenses you do not limit.

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