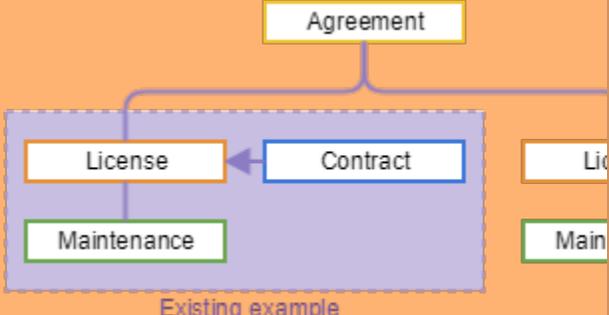# Creating an agreement entitlement

Agreement entitlements provide a way of grouping and organizing entitlements together to model the agreement structures in place between your organization and a vendor of a specific software title. Agreements can act as containers for license, maintenance, and even other agreement entitlements.

In this example

In this example we will extend the Microsoft Visio license and associated maintenance and contract created in Creating a license entitlement and Creating and linking a maintenance entitlement.

By the end of this example you will have created a new Microsoft Product agreement entitlement and linked the existing Visio license to it. You will also have created a new Microsoft Project license and associated 36 month maintenance and then linked that to the new agreement.

On this page:

- Creating an agreement entitlement
    - Check we have a deficit
    - Add a New Agreement

Creating an agreement entitlement

Check we have a deficit

To the right we have navigated to **AppClarityComplianceLicense Position** page and filtered the **Title** on Project which shows that we have an installation for **Microsoft Project** and that has a total license deficiency of **-19**.
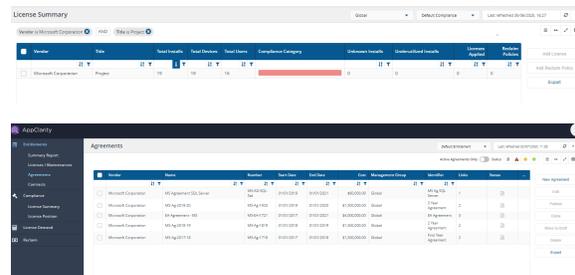
(i) You can choose which columns are displayed in Inventory and AppClarity detail tables to increase readability. On pages where you can pick the displayed columns you'll see a new control like the one highlighted below:

To find out more about this feature refer to Running your first Compliance License Summary: Choosing the columns to display in reports.

Selecting any of the displayed products and then **Compliance Details** o pens the **License Summary** page, this display can also be accessed directly and filtered, but you should know there are multiple ways to access the page.

Add a New Agreement

To add a new **Microsoft Products** agreement entitlement, navigate to the **EntitlementsAgreements** page and click on **New Agreement** , located just to the right.

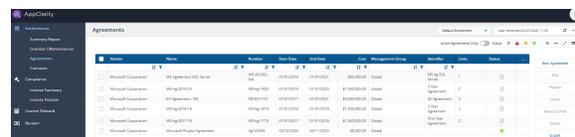To add a new **Microsoft Products** agreement entitlement:

1. Navigate to the **Entitlements Agreements** screen and click **New Agreement**, located just to the right.
2. In the **New Agreement page** we will choose a specific set of options to show how this page works. For more details on all the fields in this page please refer to New Agreement page.
3. There are lots of fields on the page but a few are mandatory. The mandatory fields have an * next to their name.
4. The page is split into a number of sections, we will start in the **Basic Information** section.
5. The **Management Group** is the first mandatory field, it is set by default to **Global**, but it can be changed to any of your existing Management Groups, in this example we will leave it at **Global**.
6. The next mandatory item is the **Vendor** field. We know that the vendor is **Microsoft Corporation**.

Now we set the following fields and click **Publish**. We could have clicked **Save draft**, if we were in the middle of making changes and didn't want to make the agreement active, the draft agreement would then be saved.

- **Name** to **Microsoft Product Agreement** (this should be the name of your agreement)
- **Number** to **Ag123456** this is not mandatory, but should be the Agreement Number
- **Entitlement Term Start Date** defaults to today's date, but should be set to the date your agreement starts, in the example we will use today's date
- **Duration** to **36**
- **Total Cost** to **$8000**

(i) From AppClarity 7.1 you can change the default currency (USD) along with the appropriate currency symbol and name from USD to a currency of your choice, for more details refer to Creating a license entitlement: Changing the default currency in AppClarity

The **Agreements** page will update and the new agreement will be listed, with the **Status** column having a green tick to show it is published.

1. We will now link the new **Agreement** to our existing **License** for **Microsoft Visio**.
2. After the actions above, we are returned to the **Entitlements - Agreements** screen.
3. Select the **Agreement** just created and click **Edit**.
4. Scroll to the **Entitlements Links** section and click **+ Add link** in the **Children** section.
5. Scroll to find the **Visio Professional License,** and then click on this and the green tick we have previously seen will appear.
6. Click **Add**.
7. Click **Publish**.

Now we'll add a new license for **Microsoft Project** (refer to Creating a license entitlement for the steps to achieve this, not forgetting to **Publish** once added):
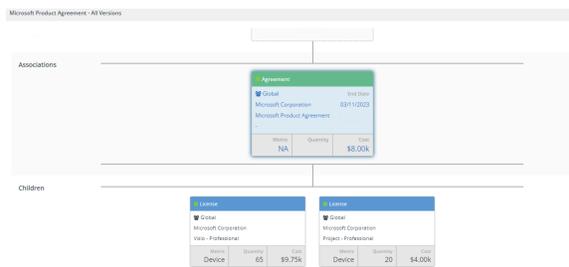
1. Enter the following details for the license:

   - **Vendor:** Microsoft Corporation
   - **Title:** Project
   - **Version Type**: Colloquial
   - **Version:** 2016

- **Edition:** Professional
- **Metric Type:** Device (this is the default)
- **Quantity:** 20
- **Entitlement Type:** Perpetual
- **Start date:** to the date the license started, or is due to start on. In our example it's set to the default of the current date
- **Costs** $200

Adding a new maintenance entitlement for **Microsoft Project**:

1. Return to the **Licenses / Maintenances** screen. Click the **New Maintenance** button.
2. We then set the details for the Maintenance click **Publish** when entered:
   - **Vendor:** Microsoft Corporation
   - **Title:** Project
   - **Edition:** Professional
   - **Quantity**: 20
   - **Entitlement Type**: Subscription (default for maintenance)
   - **Duration:** 36
   - **Unit Cost**: 50

3. We will now link the **Microsoft Product Agreement** to our new **License** for **Microsoft Project**.
4. Navigate to **Entitlements Agreements** screen.
5. Select the **Microsoft Product Agreement** and click **Edit**.
6. Scroll to the **Entitlements Links** section and Click **+ Add link** in the **Children** section.
7. Scroll to find the **Project Professional License** click on this and the green tick we have previously seen will appear.
8. Click **Add**.
9. Click **Publish**.

That has created the structure for our agreement. To see this click on the **2** in the **Links** column for the **Microsoft Product Agreement**, this will display the screen to the right.

To make a published license entitlement take effect, you have to run the **Compliance** report:

1. Switch to the **SettingsConfigurationConnectors** page and click on the **Execute** button.
2. The **Execute action** popup is displayed, enter the following:

   - **Repository**: Default Compliance
   - **Action**: Generate Report - Compliance.
3. Navigate to **MonitoringProcess Log** and wait for the action to complete, this will be **Compliance** and will have a green tick in the **Status** column when complete.

Now that the compliance report has been run, to see the impact of implementing the entitlements:

1. Switch to the **AppClarityComplianceLicense Position** page.
2. In our example you can see that **Visio** with **Edition** of **Professional** now has a **License Position** of **5.** This indicates that the installations of the software title are now licensed and there are **5** spare licenses for **Visio.** And the **License Position** for **Project** is 1.