

# New License page

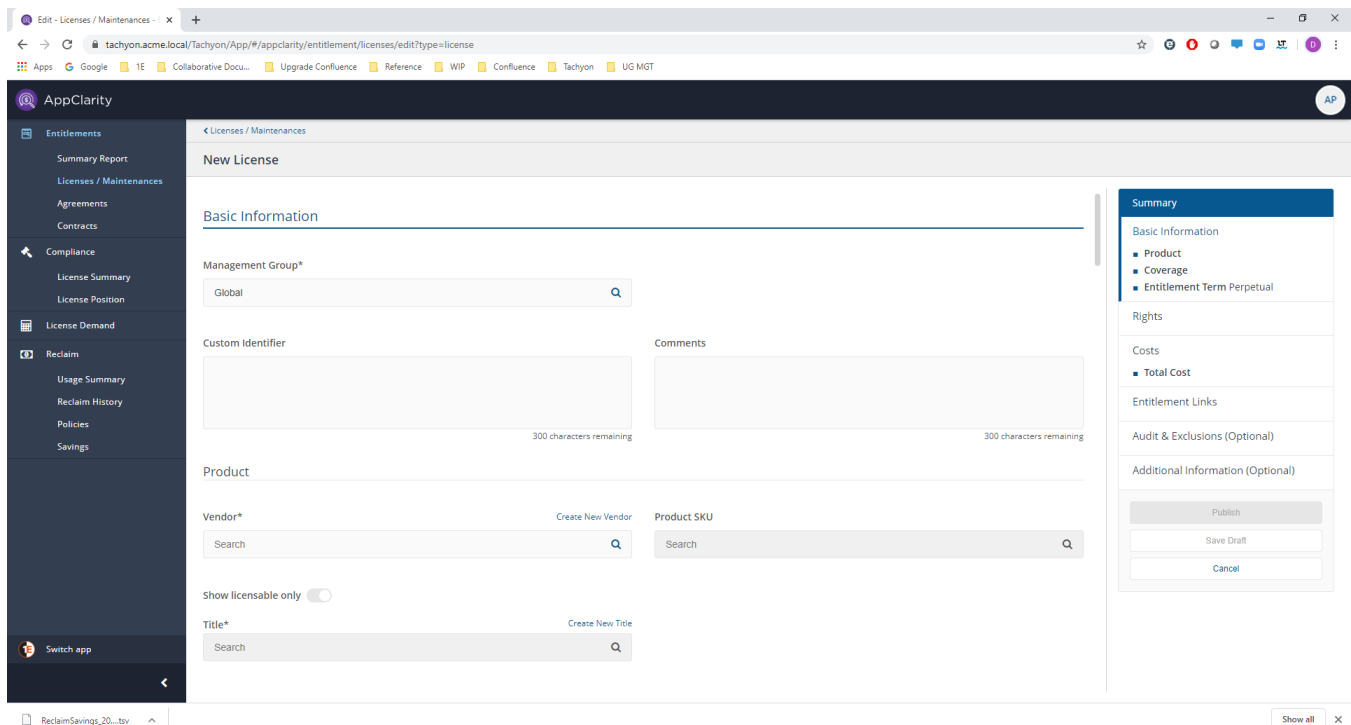
## Summary

A description of the fields in each section of the **New License** page. This also covers the **Edit License** page.

A license entitlement type in AppClarity specifies the rights and limitations of software and/or services that may be installed and/or used on an organizations computing devices. For example you could specify a license for Microsoft Visio 2016 and enable version downgrade rights to ensure that the license covers all versions up to 2016.

The sections on the **New License** or **Edit License** page are:

- [The Summary panel](#)
- [Basic Information](#)
  - [Product](#)
  - [Coverage](#)
  - [Entitlement Term](#)
- [Rights](#)
- [Costs](#)
- [Entitlement Links](#)
  - [Parent](#)
  - [Associations](#)
  - [Children](#)
- [Audit & Exclusions \(Optional\)](#)
- [Additional information \(Optional\)](#)



## The Summary panel

The Summary panel on the right-hand side of the entitlement displays a summary of the settings that have been made in the entitlement so far. It's always visible on screen and can be used to navigate between the various sections of the entitlement.

The panel also contains the following buttons:

Button	Description
Publish	Publishes the entitlement so it becomes active.
Save Draft	Saves the current settings in the entitlement to a draft. This can be used to save edits if you are part way through creating or making changes to the entitlement. It can also be used to inactivate an entitlement by removing its published status.

Cancel	Cancels the current edits and closes the page.
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**Summary**

**Basic Information**

- Product Visio
- Coverage 50 Device
- Entitlement Term 09/15/2022

Rights

Costs

- Total Cost \$43,000.00

Entitlement Links

Audit & Exclusions (Optional)

Additional Information (Optional)

Publish

Save Draft

Cancel

## Basic Information

This section deals with the basic information for the entitlement, such as details of the product, the coverage and term of the entitlement.

### Basic Information

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Management Group\*

 🔍

Custom Identifier

300 characters remaining

Comments

300 characters remaining

Field	Details
Management Group*	Here you can associate the entitlement with Management Group of your choice.
Custom Identifier	An optional field. You can specify any alpha-numeric value to help identify the entitlement in the <b>Draft</b> and <b>Published</b> pages and when linking to other entitlements.
Comments	Enter text here to store any comments you have related to the entitlement.

## Product

This sub-section defines the product covered by the entitlement.

## Product

Vendor\*

[Create New Vendor](#)

Search

Product SKU

Search

Show licensable only

Title\*

[Create New Title](#)

Search

Version Type

All Versions

Version

Search

Edition

Search

Field	Details
Vendor*	Defines the vendor of the product the license will apply to. The vendor part of the vendor, title, version and edition for a product. This must be filled out before any other fields. Suggested suitable vendors that match your text are displayed as you type into the field, which you can select to auto-complete the entry.
Product SKU	Suggested matching SKU are displayed as you type into the field, which you can select to auto-complete the entry. When you select a SKU other fields in the license will be automatically prefilled. For example, selecting the SKU for a particular edition of Microsoft Office 365 may set the <b>License Type</b> to <b>Subscription</b> , the <b>Product title</b> to <b>Office 365</b> and the <b>Edition</b> to <b>ProPlus</b> . These fields will then be fixed as they are derived from the SKU and not entered by hand.
Show licensable only	This toggle, which is on by default, sets whether the matches from 1E Catalog are filtered to show only products that are marked as licensable - and therefore appropriate for entitlements. You can flip this to off, if the product you are looking for is not visible and you're not sure if it's licensable or not, to see the unfiltered list of product related information from 1E Catalog.
Title*	Defines the title of the product the license will apply to. This is a mandatory field. The title part of the vendor, title, version and edition for a product. Suggested suitable titles from the selected vendor that match your text are displayed as you type into the field, which you can select to auto-complete the entry.
Version Type	<b>All Versions, Dot Format, or Colloquial.</b> By default this is set to <b>All Versions</b> .
Version	Defines the version of the product the license will apply to. The version part of the vendor, title, version and edition for a product. The Version format is dependent on the chosen <b>Version Type</b> . This field is disabled for a <b>Version Type</b> of <b>All Versions</b> .
Edition	Defines the edition of the product the license will apply to. The edition part of the vendor, title, version and edition for a product. Suggested suitable editions for the selected vendor and title that match your text are displayed as you type into the field, which you can select to auto-complete the entry.

## Coverage

This sub-section defines the coverage details for the entitlement, such as: the metric that will be used for the entitlement and the number of installations the entitlement covers, i.e. whether the entitlement is unlimited or defined by a specific quantity of units.

### Coverage

Metric

Device

Other metric

Unlimited

Quantity\*

Units\*

1

=

Total

Field	Details														
Metric	<p>The metric type for a license or maintenance entitlement. This may be one of:</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Core</td> <td>The metric for the license is related to the number of cores present on a device. For example, licenses for <b>Microsoft SQL database</b> are related to the number of cores on the server where <b>Microsoft SQL</b> is installed.</td> </tr> <tr> <td>Device</td> <td>The metric for the license is for devices. For example licenses for <b>Microsoft Visio</b> are on a per device basis. This is the default type.</td> </tr> <tr> <td>Other</td> <td>This can be used to reference your own license metric type.</td> </tr> <tr> <td>Processor</td> <td>The metric for the license is related to the number of processors for a device. For example, licenses for certain <b>Oracle</b> products are related to the number of processors on the server where the <b>Oracle</b> product is installed.</td> </tr> <tr> <td>PVU</td> <td>The metric for the license is related to the Processor Value Unit present on a device. For example, licenses for <b>IBM</b> products are related to the <b>Processor Value Unit (PVU)</b> for the device where the IBM product is installed.</td> </tr> <tr> <td>User</td> <td>The metric for the license is related to the users for the product. For example, <b>Microsoft Office 365</b> licenses are related to users and not the devices the software is running on.</td> </tr> </tbody> </table> <p>The <b>Metric</b> works with the <b>Quantity</b> field to determine how licenses are applied.</p>	Type	Description	Core	The metric for the license is related to the number of cores present on a device. For example, licenses for <b>Microsoft SQL database</b> are related to the number of cores on the server where <b>Microsoft SQL</b> is installed.	Device	The metric for the license is for devices. For example licenses for <b>Microsoft Visio</b> are on a per device basis. This is the default type.	Other	This can be used to reference your own license metric type.	Processor	The metric for the license is related to the number of processors for a device. For example, licenses for certain <b>Oracle</b> products are related to the number of processors on the server where the <b>Oracle</b> product is installed.	PVU	The metric for the license is related to the Processor Value Unit present on a device. For example, licenses for <b>IBM</b> products are related to the <b>Processor Value Unit (PVU)</b> for the device where the IBM product is installed.	User	The metric for the license is related to the users for the product. For example, <b>Microsoft Office 365</b> licenses are related to users and not the devices the software is running on.
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Other metric	<p>This field is enabled if the Metric field is set to Other and allows you to specify an entitlement metric that is not covered by default in AppClarity.</p> <p>This field is only enabled if <b>Other</b> is selected in the <b>Metric Type</b> for entitlements and allows you to enter a metric that is not covered by the basic <b>Metric Type</b> options.</p>														
Unlimited	If you set the <b>Unlimited</b> toggle to on, this entitlement will cover all installations and the <b>Quantity</b> and <b>Units</b> fields will be disabled.														
Quantity	Sets the number of licenses bought for this entitlement. Only enabled if the <b>Unlimited</b> toggle is set to off, in which case this field is also mandatory.														
Units	Sets the number of units per licenses purchased. Only enabled if the <b>Unlimited</b> toggle is set to off, in which case this field is also mandatory.														
Total	<p>The total number of licenses, which is the Quantity value times the Units value.</p> <p>AppClarity will count each unit in the <b>Total</b> field against a single unit of the given <b>Metric</b> type. So if the <b>Metric</b> type is <b>Device</b> and the <b>Total</b> calculates to <b>50</b> this will count against <b>50</b> devices. For an SQL Server Enterprise example the <b>Metric</b> type would be <b>Core</b> so this will count against <b>50</b> cores.</p>														

## Entitlement Term

This sub-section defines the type and length details for the entitlement, such as: the type (perpetual or subscription), the start date and, if the type is subscription, the duration and end date.

### Entitlement Term

#### Entitlement Type

Perpetual

#### Start Date\*

03/16/2020



#### Duration\*

(Months)

#### End Date\*

MM/DD/YYYY



Field	Details
Entitlement Type	<p>For License entitlements this can be set to <b>Perpetual</b> or <b>Subscription</b>. By default this is set to <b>Perpetual</b>.</p> <p>For Maintenance entitlements this can only be set to <b>Subscription</b>.</p>

Start Date*	When the entitlement starts applying. This defaults to the date the entitlement was created.
Duration*	<p>The <b>Duration</b> and <b>End Date</b> fields are only enabled for <b>Subscription</b> entitlements.</p> <p>If you set the <b>Duration</b> the <b>End Date</b> is calculated. If you set the <b>End Date</b> the <b>Duration</b> is calculated.</p> <p>These fields determine how long the entitlement is applicable for after start date.</p> <p>The <b>Duration</b> is set in terms of months and determines the number of months the entitlement will be valid for.</p>
End Date*	<p>The <b>Duration</b> and <b>End Date</b> fields are only enabled for <b>Subscription</b> entitlements.</p> <p>If you set the <b>Duration</b> the <b>End Date</b> is calculated. If you set the <b>End Date</b> the <b>Duration</b> is calculated.</p> <p>These fields determine how long the entitlement is applicable for after start date.</p> <p>The <b>End Date</b> indicates the last date the entitlement will be valid until and is set using a date picker.</p>

## Rights

This section lets you control how the entitlement applies to existing versions of the product it's related to.

### Rights

	Available	Persistent
Version Upgrade	<input type="checkbox"/>	<input type="checkbox"/>
Version Downgrade	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edition Downgrade	<input type="checkbox"/>	<input type="checkbox"/>
Multi Instance	<input type="checkbox"/>	

Secondary use count right

Version	
0.1	✓
1.0	✓
1.2	✓
...	✓

Field	Details
Version Upgrade	Rights to check if the entitlement is also applicable on higher versions of selected version
Version Downgrade	Rights to check if the entitlement is also applicable on lower versions of selected version. By default it is true
Edition Downgrade	Rights to check if the entitlement is also applicable on lower editions of selected edition
Multi Instance	Rights to check if the same license is also applicable on multiple installations on same device
Secondary use count right	The available count of secondary uses
Versions covered	The table below the fields shows the overall versions and editions covered by the entitlement based on the selected rights.

## Costs

This section lets you control how the entitlement is costed and how it can be considered within the overall spend.

## Costs

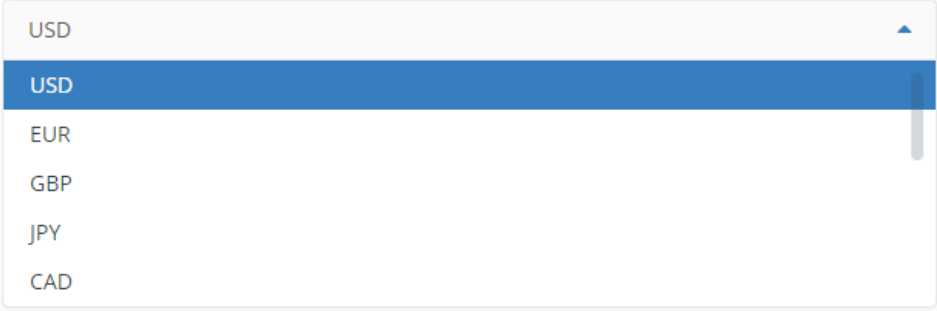
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Currency

Payment Frequency

Unit Cost

License Cost

Field	Details
Currency	<p>The currency applied to the entitlement. Clicking on the Currency field displays a list of currencies to choose from.</p> <p><b>Currency</b></p> 
Payment Frequency	<p><b>OnceOff, Monthly, Quarterly, Yearly.</b> The default is <b>OnceOff</b>.</p>
Unit Cost	<p>The cost of the licence per unit, combined with the <b>Quantity</b> and <b>Unit Cost Type</b> values to calculate the license cost.</p>
License Cost	<p>This is calculated based on value filed in the <b>Quantity, Unit Cost</b> and <b>Payment Frequency</b>. This value only displays the cost and cannot be edited directly.</p>

## Entitlement Links

This section lets you create links between your entitlements. If you are creating a new entitlement this section will initially look like this:

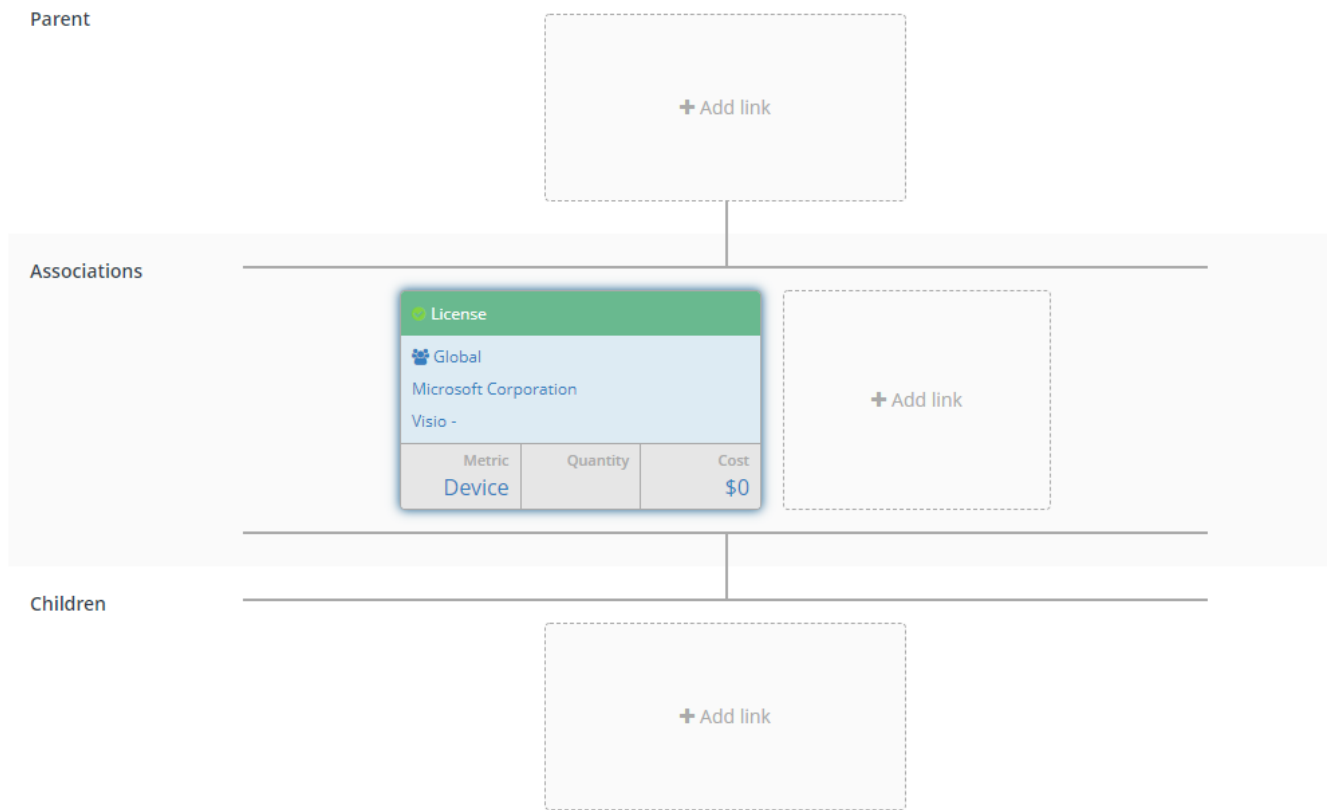
### Entitlement Links

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[Save the entitlement to start adding links](#)

After you have saved the entitlement this section provides an interface for linking it to other entitlements:

## Entitlement Links

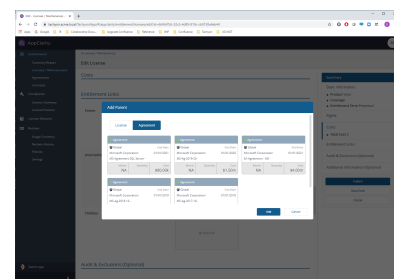
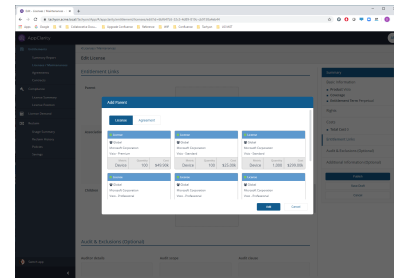


There are three sub-sections:

### Parent

Here you can link parent licenses or agreements. Clicking on the **+Add link** area displays the **Add Parent** popup.

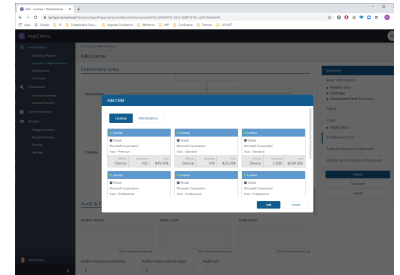
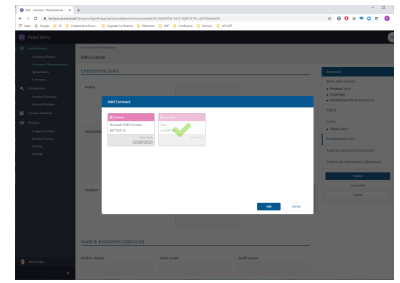
Select **License** or **Agreement** to add that type of link, a list of entitlements of the selected type will be displayed. Click on any of these and a green check mark will appear to indicate the selected parent, you can only select one. Once you've made your choice click the **Add** button to link the checked parent.



### Associations

Here you can link contracts. Clicking on the **+Add link** area displays the **Add Contract** popup.

A list of contracts will be displayed. Click on any of these and a green check mark will appear to indicate the selected contract, you can select more than one contract to link. Once you've made your choice click the **Add** button to link the checked contract(s).



## Children

Here you can link child licenses or maintenances. Clicking on the **+Add link** area displays the **Add Child** popup.

Select **License** or **Agreement** to add that type of link, a list of entitlements of the selected type will be displayed. Click on any of these and a green check mark will appear to indicate the selected child - you can select more than one. Once you've made your choice click the **Add** button to link the checked children.

## Audit & Exclusions (Optional)

This section lets you control how the entitlement is audited.

### Audit & Exclusions (Optional)

#### Auditor details

300 characters remaining

#### Audit scope

300 characters remaining

#### Audit clause

300 characters remaining

#### Auditor frequency (months)

#### Auditor notice period (days)

#### Audit tool

Field	Details
Auditor Details	Organizations that are allowed to perform the audit including (if appropriate), the licensor organization and any third-party organizations, according to what was agreed in the contract.
Audit Scope	Defines what part of the software customer organization is allowed to be audited.
Audit Clause	Provides additional information on what could trigger the audit.
Auditor Frequency	Definition of the highest agreed frequency of the audit expressed in months.
Auditor Notice period	Notice period in days.
Audit Tool	Name of the tool(s) which are approved for use in the audit.

## Additional information (Optional)

This section lets you enter additional information related to the entitlement that may come from a Vendor agreement or contract.

Sub-Section	Field	Field Details



	Business Unit	Specifies the Business Unit the agreement will be applied to. This may correspond to your management groups, depending on how you have those configured.
	Sponsor	Name of the person who manages the budget associated with an agreement (this field is likely to be used only on agreements, but could be extended to other entitlements)
Invoice	Number	The invoice number, usually specified in the customer contract.
	Line Item Number	This optionally identifies the line number (if provided) on the customer contract that pertains to the invoice.
	Date	The date for the invoice.
Purchase Order	Number	The purchase order number, usually specified in the customer contract.
	Line Item Number	This optionally identifies the line number (if provided) on the customer contract that pertains to the purchase order.
	Date	The date for the purchase order.
Direct Supplier	Number	The number that identifies the direct supplier. For example, in some organizations this may be the same as the contract number.
	Line Item Number	This optionally identifies the line number (if provided) on the contract that pertains to the direct supplier.
	Date	The date for the contract.
Internal Order	Number	The ITARS or similar internal identifier for the order as specified in the customer contract.
	Line Item Number	This optionally identifies the line number (if provided) on the contract that pertains to the internal order.
	Date	The date for the contract.
Licensor Details	Number	The number (or name) of the licensor, could be the vendor or a VAR.
	Line Item Number	This is intended as a reference to a licensor source other than an invoice, e.g. to an on-line portal of license purchases.
	Date	The date for the contract.
FOSS Details	IsFoss	This value is true only if the granted rights fulfill the requirements of both definition of the Free software maintained by the Free Software Foundation.
	Copy Left	This value provides information on whether derivative works (which are always allowed for open source software) are themselves required to be open source software. There are three allowed values: "strong" means that all kinds of derivative works are required to be open source software themselves, "no" means that for all kinds of derivative works, it is allowed to distribute the derivative work as proprietary software. The intermediate value of "weak" means that there are some restrictions and the details are to be checked in the license.
	Trade mark restrictions	FOSS trademark restrictions.

Additional information (Optional)

Business Unit  Sponsor

Invoice

Number  Line Item number  Date

Purchase Order

Number  Line Item number  Date

Direct supplier

Number  Line Item number  Date

Internal Order

Number  Line Item number  Date

Licensor details

Number  Line Item number  Date

FOSS details

Is FOSS  Copy left

Trademark restrictions

FO (checkboxes) min/max