

## User Guide

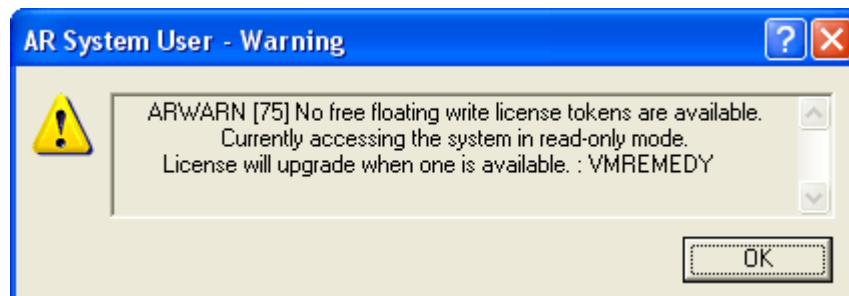
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### ----- INTRODUCTION -----

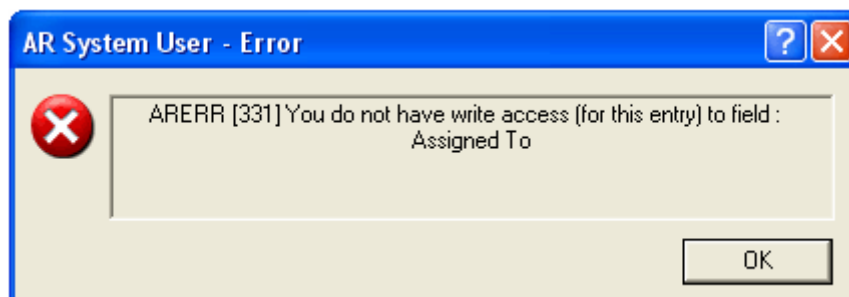
**Floating licenses** are meant to be shared among users who access the system infrequently throughout the day.

**Fixed licenses** are dedicated to users that are frequently accessing the system most of the day, especially during peak usage times. Remedy Administrators must have a Fixed license.

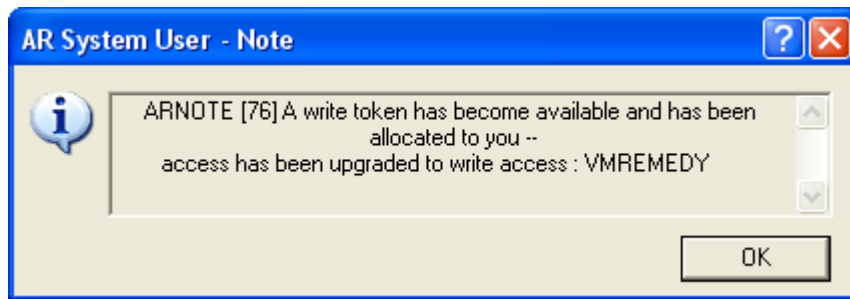
- When a user logs in with a Floating license and performs a search, submit or modify action, they are given a Floating Write token. If all of the Floating Write tokens have been assigned, they will receive a warning message:



- In '**Read-Only Mode**', the user can still search and submit tickets, but if they attempt to modify a ticket, they will receive an error message:



- If a Floating Write Token has become available by the time the user attempts another modification to a ticket, they will receive a note:



#### ----- GENERAL GUIDELINES FOR FLOATING LICENSE MANAGEMENT -----

To ensure that unused Floating Write Tokens are released and made available as soon as possible, set the Floating License Timeout to **one** hour.

- **Remedy Administrator Tool** > File > Server Information > Timeouts > Floating License Timeout (hours) > Write
- **Note:** If you are using the **7.1.00 Remedy Administrator Tool**, this information is now located in the:
- **Remedy User Tool** > Object List > AR System Administration Console > System > General > Server Information > Timeouts > Floating License Timeout (hours) > Write

Users in other time zones should be considered for a Floating license if their normal usage occurs outside the peak usage hours of the system. This will maximize the number of users who can effectively share the Floating Write token throughout the entire day.

----- **MONITORING LICENSE USAGE** -----

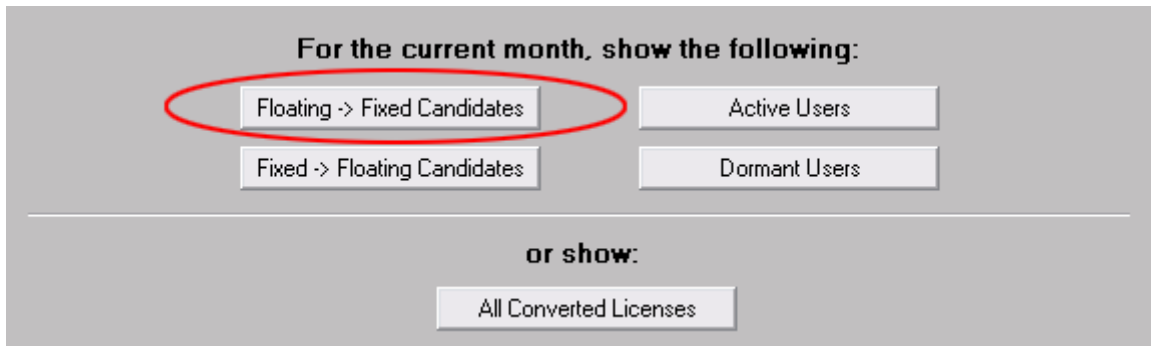
1. With the **Remedy User Tool**, log into the server that contains the LicenseTracker forms with a Remedy Administrator account. License usage patterns will change over time, so it is recommended that monitoring be performed at least once per week.
2. In the **Object List**, open the form **WAVE-LicenseStats** in a search window. Go to the **'Summary Type'** drop-down menu; then choose **"Daily"**. Initiate your search and examine the most recent entry.
3. If the **'Max % - Floating License Usage'** (red) is greater than 98%, check the **'Max Recorded -> Floating'** (green) and compare it to **'Purchased -> Floating'** (black).
  - As a general guideline, if there are less than 20 Floating Write Tokens available, it is time to re-allocate licenses before users start reporting that they do not have the Write access needed to do their work.

In the screenshot below **immediate action is necessary** since 189 Floating users are attempting to use 185 Floating Write tokens (black). With no more tokens are available; four Floating users have been forced to use the system in **Read-Only Mode** (pink).

The screenshot displays the LicenseTracker - Summary interface. At the top, there is a table titled 'Matching WAVE-LicenseStats' with columns for Summary Type, First Update, Last Update, Fixed Max, Float Max, Float/Re..., Read Max, Total Max, and Max Users Occurred. Below this is a 'Modify WAVE-LicenseStats' form with a 'Save' button. The main area shows a 'Stats' tab with various license usage metrics. The 'Floating License Usage' section shows 'Current' at 13.0%, 'Average' at 34.5%, and 'Max' at 102.2% (circled in red). The 'Max Utilization Occurred' is 6/18/2007 10:00:00 AM. The 'Ratio of Reg Users to available Floating Licenses' is 6.0. The 'Ratio of Active Users to available Floating Licenses' is 3.7. The 'Remaining Fixed Licenses' is 13. The 'Fixed Licenses dormant >= 3 months' is 1. The 'Potential Remaining Fixed Licenses' is 14. The 'Max Recorded' is 20, and the 'Max Users Occurred' is 6/18/2007 10:00:00 AM (circled in blue). The 'Floating License Usage' section also shows 'Max Recorded' at 185 (circled in green) and 'Max Users Occurred' at 4 (circled in pink).

4. Be sure to take note of the time when **'Max Users Occurred'** (blue). Knowing your system's peak usage times will allow you to make a more informed decision when re-allocating licenses.

- To identify users that are monopolizing their Floating license and should be considered for a Fixed license, open the form **WAVE-UserStats** in a search window and click on the **'Floating -> Fixed Candidates'** button.



The results are ordered (**'Total Hours Logged On'**, then by **'Utilization'**) so that the best candidates for conversion are at the top of the list.

Before converting a user's license type, compare their **'Connect Time'** and **'Last Access Time'** to your system's peak usage from **Step #4**.

- **For example**, if the maximum number of users occurs on weekdays between 10am and 11am, there is no benefit in converting a user who monopolizes a Floating license between 3pm-11pm.

User Name	License Type	First Update	Last Update	Total Hours ...	Total Hours ...	Utilization	Dormant
vergel	Floating	7/1/2007 12:01:01 AM	7/9/2007 4:58:00 PM	75.48	11.40	84.89	
soubaga	Floating	7/1/2007 12:01:01 AM	7/9/2007 4:58:00 PM	64.09	7.69	88.00	
bedardst	Floating	7/1/2007 12:01:01 AM	7/9/2007 2:38:00 PM	44.06	5.91	86.59	
fergust	Floating	7/1/2007 12:01:01 AM	7/9/2007 6:58:00 AM	31.77	1.95	93.86	
leblonmm	Floating	7/1/2007 12:01:01 AM	7/9/2007 3:58:00 PM	31.41	5.09	83.78	
rossp	Floating	7/1/2007 12:01:01 AM	7/9/2007 4:58:00 PM	30.36	5.11	83.17	

Modify WAVE-UserStats 00000000046882

**LicenseTracker - Usage**

Stats    About LicenseTracker    About Waveform

User Name:  License Type:  # of Updates:

First Update:  Last Update:  Dormant:

Connect Time:

Last Access Time:

Current Hours Logged On:  Current Hours Spent Idle:

Average Hours Logged On:  Average Hours Spent Idle:

Total Hours Logged On:  Total Hours Spent Idle:

Utilization:  %

- Click on the **'View User Ticket'** for each user you wish to convert, change their **'License Type'** to **"Fixed"**, and save your changes.

User Name	vergel	License Type	Floating	# of Updates	114
First Update	7/1/2007 12:01:01 AM	Last Update	7/16/2007 8:40:15 PM	Dormant	
Connect Time	7/9/2007 8:14:13 AM	Last Access Time	7/9/2007 4:08:03 PM	Current Hours Logged On	8.73
Current Hours Logged On	8.73	Current Hours Spent Idle	0.83	Average Hours Logged On	4.07
Average Hours Logged On	4.07	Average Hours Spent Idle	0.25	Total Hours Logged On	75.48
Total Hours Logged On	75.48	Total Hours Spent Idle	11.40	Utilization	84.89 %
<input type="button" value="View User Ticket"/>					

Remedy User - [User (Modify)]

File Edit View Tools Actions Window Help

Modify User 000000000000048

BMC - Remedy AR System bmcsoftware

**User Information**

<b>Login Name</b>	vergel	<b>License Type</b>	<input type="radio"/> Read <input checked="" type="radio"/> Fixed <input type="radio"/> Floating <input type="radio"/> Restricted Read
<b>Full Name</b>	Lorraine Vergé	<b>Full Text License Type</b>	<input checked="" type="radio"/> None <input type="radio"/> Fixed <input type="radio"/> Floating
<b>Group List</b>	Finance APP-Management	<b>Application License</b>	
<b>Computed Group List</b>		<b>Default Notify Mechanism</b>	<input type="radio"/> None <input type="radio"/> Alert <input checked="" type="radio"/> Email
<b>Creator</b>	AR System	<b>Email Address</b>	vergel@company.com
<b>Create Date</b>	9/16/2007 2:48:08 PM	<b>Status</b>	<input checked="" type="radio"/> Current
<b>Request ID</b>	000000000000048	<b>Last Modified By</b>	guzmarh
		<b>Modified Date</b>	9/16/2007 2:48:08 PM
		<b>Unique Identifier</b>	NO ID GENERATED
		<b>Application License Type</b>	Asset-Fixed

- **Note:** If you change the license type of a user, you will not see that change reflected in **WAVE-UserStats** until the user logs in again or the Scheduled Task that runs daily captures statistics on all registered users.

7. To ensure that there are sufficient Fixed licenses available after **Step #6**, you should also identify users that are not utilizing their Fixed license and should be converted to a Floating license. A **minimum of 5 Fixed licenses** should be held in reserve.

➤ **Warning:** Before converting a user from a Fixed to a Floating license, verify that the user is **NOT** a **Remedy Administrator** or a **system account** used for automated data imports or interfacing with an external system.

➤ **Consult with your senior Remedy System Administrator to obtain a list of the system accounts currently in use that require a Fixed license.**

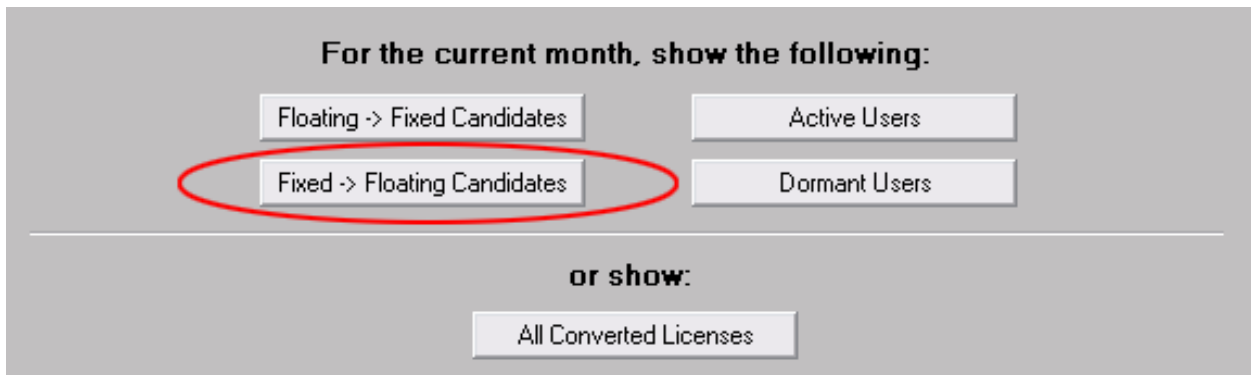
A current list of Remedy Administrators can be determined by logging into the server where license usage is being monitored.

- In the **Object List**, open the form **Group** in a search window; next type "1" in the '**Group ID**' field, and click on the '**Show Members**' link.

The screenshot shows the 'BMC - Remedy AR System' interface. The 'Group Information' form is displayed with the following fields and controls:

- Group Name:** Empty text input field.
- Group ID:** Text input field containing the value '1', circled in blue.
- Group Type:** Radio buttons for 'None', 'View', and 'Change'.
- Long Group Name:** Text input field with a search icon (three dots).
- Group Category:** Radio buttons for 'Regular', 'Dynamic', and 'Computed'.
- Floating Licenses:** Spin control.
- Floating FTS Licenses:** Spin control.
- Comments:** Text input field with a search icon.
- Status:** Radio button for 'Current'.
- SHOW MEMBERS:** A blue hyperlink circled in red.

- To identify users that are not using their Fixed license and should be considered for a Floating license, open the form **WAVE-UserStats** in a search window, and click on the **'Fixed -> Floating Candidates'** button.



- The results are ordered (**'Dormant'**, then by **'Total Hours Logged On'**) so that the best candidates for conversion are at the top of the list.

**Matching WAVE-UserStats**

User Name	License Type	First Update	Last Update	Total Hours ...	Total Hours ...	Utilization	Dormant
charboa	Fixed	7/1/2007 12:01:01 AM	7/1/2007 12:01:01 AM				Last 2 Months
davisj	Fixed	7/1/2007 12:01:01 AM	7/1/2007 12:01:01 AM				Last 2 Months
webberj	Fixed	7/1/2007 12:01:01 AM	7/1/2007 12:01:01 AM				This Month
coutura	Fixed	7/1/2007 12:01:01 AM	7/5/2007 6:58:00 AM	1.44	1.44	0.12	
patterf	Fixed	7/1/2007 12:01:01 AM	7/5/2007 12:58:00 PM	3.37	3.25	3.63	
smithk	Fixed	7/1/2007 12:01:01 AM	7/6/2007 4:58:00 PM	6.54	5.93	9.43	

Modify WAVE-UserStats 00000000046836

**LicenseTracker - Usage**

**Stats** | About LicenseTracker | About Waveform

User Name charboa	License Type Fixed	# of Updates 0
First Update 7/1/2007 12:01:01 AM	Last Update 7/1/2007 12:01:01 AM	Dormant Last 2 Months

Connect Time	Last Access Time
Current Hours Logged On	Current Hours Spent Idle
Average Hours Logged On	Average Hours Spent Idle
Total Hours Logged On	Total Hours Spent Idle

Utilization % View User Ticket

- Click on the **'View User Ticket'** for each user you wish convert, change their **'License Type'** to **"Floating"**, and save your changes.

User Name charboa	License Type Fixed	# of Updates 0
First Update 7/1/2007 12:01:01 AM	Last Update 7/1/2007 12:01:01 AM	Dormant Last 2 Months
Connect Time	Last Access Time	
Current Hours Logged On	Current Hours Spent Idle	
Average Hours Logged On	Average Hours Spent Idle	
Total Hours Logged On	Total Hours Spent Idle	
Utilization	<b>View User Ticket</b>	

Remedy User - [User (Modify)]

File Edit View Tools Actions Window Help

Modify User 000000000000048

BMC - Remedy AR System bmcsoftware

**User Information**

<b>Login Name</b>	charboa	<b>License Type</b>	<input type="radio"/> Read <input type="radio"/> Fixed <input checked="" type="radio"/> Floating <input type="radio"/> Restricted Read
<b>Full Name</b>	Alex Charbo	<b>Full Text License Type</b>	<input checked="" type="radio"/> None <input type="radio"/> Fixed <input type="radio"/> Floating
<b>Password</b>		<b>Application License</b>	
<b>Group List</b>	Finance APP-Management	<b>Default Notify Mechanism</b>	<input type="radio"/> None <input type="radio"/> Alert <input checked="" type="radio"/> Email
<b>Computed Group List</b>		<b>Email Address</b>	charboa@company.com
<b>Creator</b>	AR System	<b>Status</b>	<input checked="" type="radio"/> Current
<b>Create Date</b>	9/16/2007 2:48:08 PM	<b>Last Modified By</b>	fieldea
<b>Request ID</b>	000000000000048	<b>Modified Date</b>	9/17/2007 12:16:55 AM
		<b>Unique Identifier</b>	NO ID GENERATED
		<b>Application License Type</b>	Asset-Fixed

10. To review the list of users that have had their license type converted, open the form **WAVE-ConversionStats** in a search window, enter “%” in the ‘User Name’ and initiate your search.

Information on usage at the time of conversion is captured to provide a justification for the license conversion.

This data can also be used to determine the cost savings achieved by re-allocating licenses based on actual usage rather than purchasing additional licenses.

- **For example**, if a user is monopolizing a Floating license throughout the day, by changing to a Fixed license, you have effectively increased the number of occasional users who can access the system without incurring the cost of purchasing an additional Floating license.
- **Note:** If you change the license type of a user, you will not see that change reflected in this form until the user logs in again or the Scheduled Task that runs daily captures statistics on all registered users.

The screenshot shows the 'Matching WAVE-ConversionStats' window. At the top is a table with the following data:

User Name	Current License Type	Previous License Type	Date License Converted	Dormant	Total Hours Logged On	Total Hours Spent Idle	Utilization
schoepm	Fixed	Floating	7/3/2007		30.66	1.36	95.57
munihair	Floating	Fixed	7/3/2007	Last 3 Months			
lalibem	Fixed	Floating	7/5/2007		53.52	3.32	93.79
dargish	Read	Floating	7/5/2007	This Month			
feminif	Read	Floating	7/5/2007	Last 3 Months			
maclean	Floating	Read	7/5/2007	Last 3 Months			

Below the table is a form titled 'Modify WAVE-ConversionStats 00000000000229'. The form contains the following fields:

- User Name: schoepm
- Current License Type: Fixed
- Previous License Type: Floating
- Date License Converted: 7/3/2007

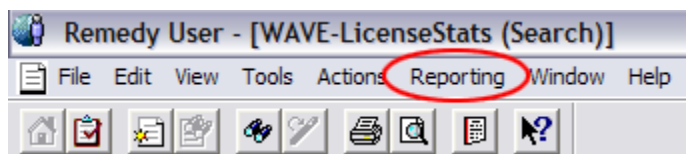
Under the heading 'At the time of conversion:', there are four fields:

- Dormant: (empty dropdown)
- Total Hours Logged On: 30.66
- Total Hours Spent Idle: 1.36
- Utilization: 95.57 %

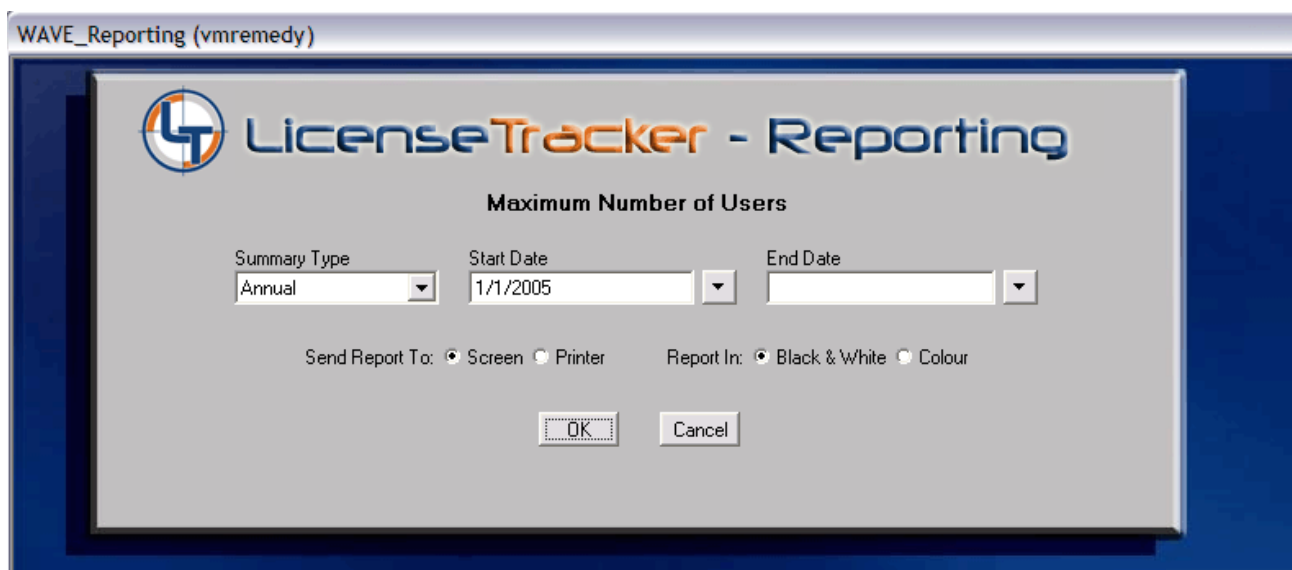
## ----- REPORTING -----

The reporting feature available on **WAVE-LicenseStats** will generate a graphical display of license utilization for a specified interval and duration that includes:

- The maximum number of licenses in use
  - The peak usage hours of the system
1. With the **Remedy User Tool**, log into the server that contains the LicenseTracker forms with a Remedy Administrator account.
  2. In the **Object List**, open the form **WAVE-LicenseStats** in a search window; then click on the **'Reporting'** menu title, located on the top Window Menu Bar.



- The **Reporting** window will appear where you may change the default settings for the query.

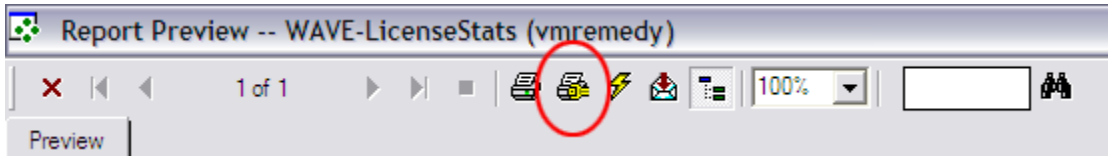


3. First, choose a **'Summary Type'** from the drop-down menu. Next, pick a **'Start Date'** and an **'End Date'**. If **'End Date'** is left blank, the current date will automatically be used.

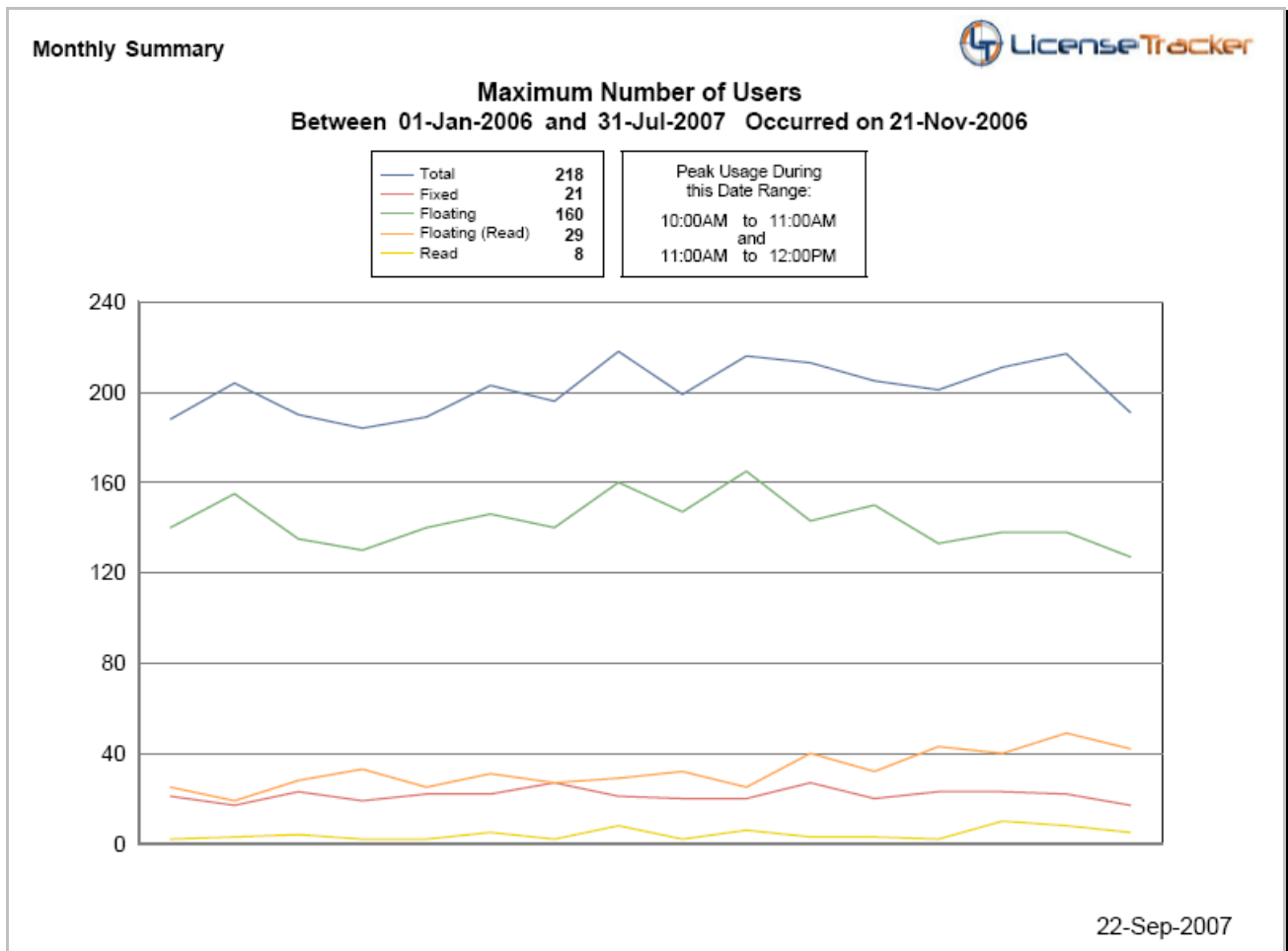
4. It is recommended that you preview the report on the "Screen" before sending it to the "Printer" after selecting "Black & White" or "Colour".

➤ **Note:** By sending the report to the "Printer", it will automatically send it to the printer's default settings and you will not see a **Print Setup** dialog.

- If you wish to change the **Print Setup**, you may do so from within the 'Report Preview' as shown below.



5. Click 'OK' to generate the Crystal Report.



## ----- CONFIGURATION -----

To review or change the settings used for threshold identification and notification preferences; open the form **WAVE-Configuration** in a search window.

It is advised that you use the default values for 2-3 days before making changes to allow the LicenseTracker adequate time to gather an accurate baseline.

- For '**Floating -> Fixed Candidates**', the lowest recommended threshold is **"60"** percent.
  
- For '**Fixed -> Floating Candidates**', the highest recommended threshold is **"30"** percent.

The screenshot shows the 'Modify WAVE-Configuration' window with the following settings:

- Thresholds for identifying:**
  - 1. Floating -> Fixed Candidates: Utilization  $\geq$  80 % AND has a Minimum of 5 Total Hours Logged On
  - 2. Fixed -> Floating Candidates: Utilization  $\leq$  15 % OR has been Dormant (This Month)
- Send notification when:**
  - 1. The maximum number of concurrent users exceeds the previous record:  No  Yes. Send Email To: administrator@company.com
  - 2. Floating users are forced to use Read licenses:  No  Yes. Send Email To: administrator@company.com