

How to create customer licenses

Any Technical database contact can be used as a license provider.

First create a License Template:

1. Edit the specific technical contact from your “view techs” admin drop down
2. Select ‘Yes’ under the Licensed Provider field and click ‘Submit’
3. Select the entry from the ‘View Licensing Templates’ admin drop down
4. Edit any appropriate fields to customize the licensing template – the pre-entered field names are only suggestions and can be changed. Once you are finished click ‘Submit’

Note: “Label 21 (Date)” is an email alert field. Modify the number of days in advance that you wish to receive an email alert. See step 10 below.

Licensing is built as a tree model. The three yellow licensing fields represent three hierarchical levels for each license:

You can add multiple top level ‘License Identifiers’ to each client.

Multiple License Classifications can be added to each License Identifier.

Multiple Licensing Details can be added to each License Classification

Then add the License Template to the appropriate client:

5. From the ‘View Clients’ admin drop down select the specific client
6. Click on the “Add Licensing Info” link
7. Select the specific Template and click ‘Submit’

Note: Licensing data is three levels deep – you can navigate to any level using the ‘cookie crumb’ links from the top navigation bar.

8. Click ‘Edit Info’ to edit the top level licensing data for your client and ‘Submit’
9. Click ‘Add Licensing Classification’ to modify the second licensing level
10. Enter an appropriate date – This is usually a License Expiration date. You will receive an email alert according to the number of days in advance of this date which was entered in the License Template. See Note in step 4 above.

Note: If the date entered has not already passed you may toggle whether you wish to receive an email alert for this specific license by selecting ‘Reminder Sent’ or ‘Reminder Unsent’. If you already received an email alert for this license and wish to receive another, select ‘Reminder Unsent’. The email alerting engine runs every midnight – you will receive the alert for this license the following midnight, as long as the date entered did not pass.

A separate license expiration email alert is also sent to you on the exact date entered for this field. The first email is a “Pending Expiration” alert.

11. Click on 'Browse' to locate any appropriate license file(s) to upload to the database, and then 'Submit'.
12. The license status may also be changed here by selecting 'Active' or 'Inactive' from the Status field. This is used to archive old licenses. You may toggle the license views to show active or inactive licenses from the License Classification top level view. Simply click on the 'Click to view inactive' hyperlink on the License Classification bar.
13. Click on the 'Add Licensing Detail' link to enter the third level of licensing data.
14. Licensing may be deleted. You must delete licensing in reverse order of the way it was created. First delete the licensing detail, a 'Delete Licensing' link is available to delete the License Classification. Finally click on 'Delete Licensing' again to remove the top level License Identifier.

License Reporting.

Select the 'License Reports' admin drop down to generate historical license reports. The Minimum and Maximum Days fields are used to show a day range of all license expiration dates (see Note in step 4 above) from the past to the future.

Say you want to see all client license expirations for a specific template three months in the past and ranging to four months in the future:

Enter -90 (note the negative number) in the Minimum Days field

Enter 120 in the Maximum Days field

After clicking 'Submit' a detailed license report will be generated for any client that uses the specific license and has a matching date field which falls into the day range chosen.