SAM Monthly Best Practices Webinars

Session 17: Allocations and Exemptions for Optimal License Consumption

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Agenda

1. Last session’s pointers and answers to questions
2. News
    1. Updates in the Best Practice Hub
    2. ITAM / FNMS 2022R2.1
3. Allocations and Exemptions for Optimal License Consumption
    1. Business context
    2. License priorities
    3. Allocations / Exemption design
    4. Use cases: Adobe subscriptions (from AD), Windows Server Optimization
    5. Tips and tricks
    6. To come: Intelligent License Allocations and Exemptions

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Last Session: Windows Server and CIS Optimal License Position in in 1 hour!

- Useful pointers
  - Recording and PowerPoint: here
- Answers to questions:
  - Would it be possible to adjust the optimized number for VMs in a VM Host to determine whether we should use CIS standard or datacenter? sorry if I missed this.
    - I insisted at the beginning of the demo of the “Price Per right (per core)” of the licenses. The report has default values (that contain the typical price ratios that will influence the thresholds). The license computes “references licenses” (see how they are computed in the doc). You can then set overridden price if you want to force the price.
  - Is there any way for the report to reflect a TIME element to the costs?
    - For example, if our underlying purchase for a CIS license covers 3 years, then the USD amounts in the report is reflecting cost over 3 years. For another product or license, the underlying purchase might be structured based on 1 year, so in that case, the report would be reflecting the cost for 1 year. So is there any kind of logic to build into any cost reporting that would take situations like this into account and "normalize" across the cost across a standard unit of time?
    - I would use a yearly price (like for TCO: subreption cost or perpetual license cost / 4 + yearly maintenance
  - Will the report for CIS be canned or will it be documented for us to build? To include how to create the restriction rule?
    - The Windows Server Optimization reports are present in 2022R1 and 2022R2 (flat) have extensive documentation. The pptx documentation describes in detail the 3 approaches, finally, the Windows Server and SQL Server Optimization reports KB (for on prem customers) contains now the per VM licensing and a SQL script for automated allocations. Upgrade to 2022R2 to enjoy intelligent restrictions, SAM Optimization Hub and all reports!

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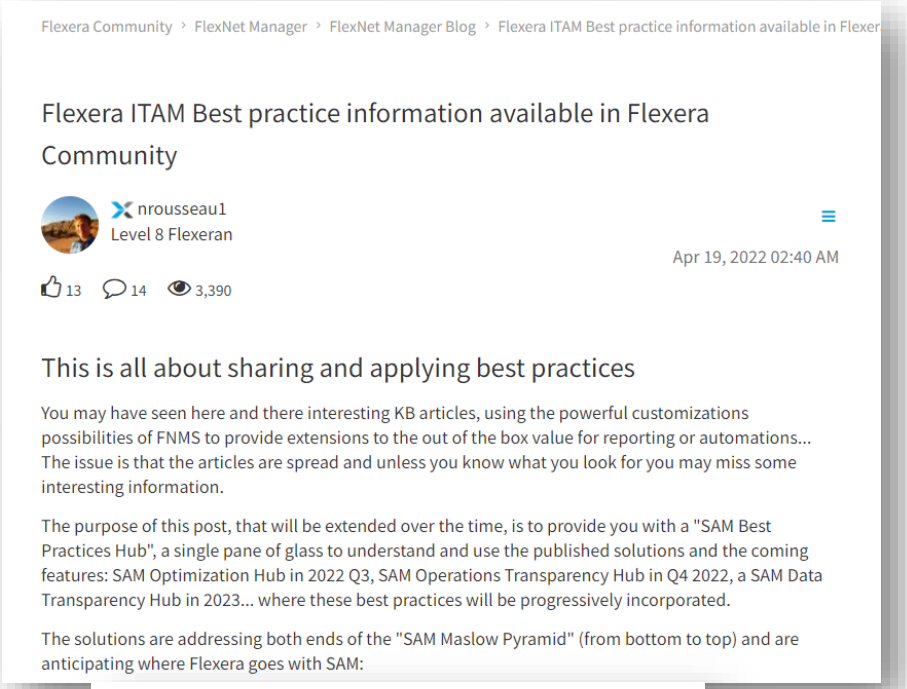
News

- ITAM 2022 R2.1 Released 25th / Feb 1st
  - Creation of a new “allocation reason”
  - Enhancement of the VMs Inventory Gaps From vCenter report (last known state, VM type, device name columns)
  - Recognition of JBoss by 2022R2.1 agent
- ITAM 2022 R2.2
  - 03/01
  - Will include
    - The Trends for the SAM Optimization Hub
    - More reports of the Operations Hub
    - Is Server column in inventory screens, Cluster in Apply allocations… screen
- The “Best practice Hub” gives many pointers to existing best practice and visibility on the 3 coming Hubs. New link to SAM Best practices calls, new refreshed information and screenshots of the Hubs
- Please check if you received the
  - Flexera November ITAM Newsletter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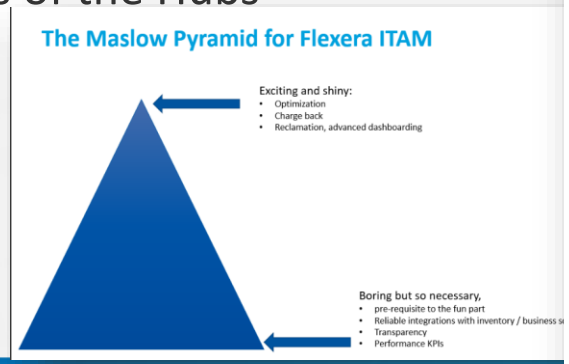
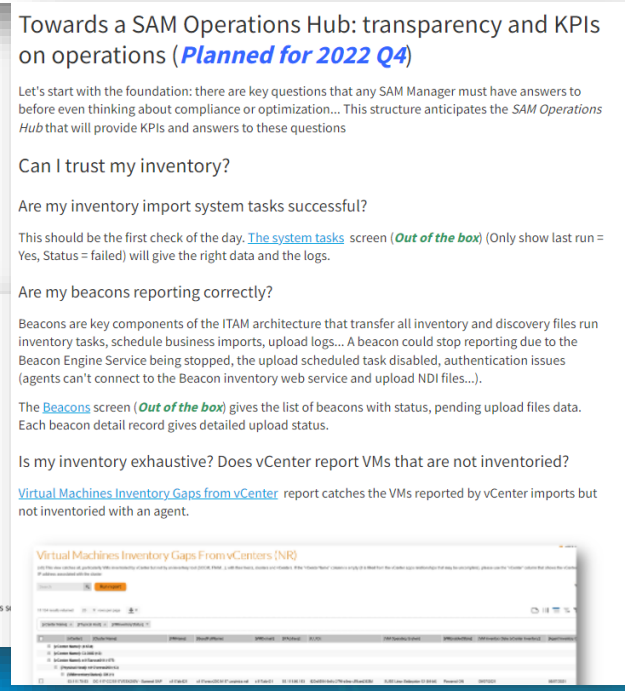
This is all about sharing and applying best practices

You may have seen here and there interesting KB articles, using the powerful customizations possibilities of FNMS to provide extensions to the out of the box value for reporting or automations... The issue is that the articles are spread and unless you know what you look for you may miss some interesting information.

The purpose of this post, that will be extended over the time, is to provide you with a "SAM Best Practices Hub", a single pane of glass to understand and use the published solutions and the coming features: SAM Optimization Hub in 2022 Q3, SAM Operations Transparency Hub in Q4 2022, a SAM Data Transparency Hub in 2023... where these best practices will be progressively incorporated.

The solutions are addressing both ends of the "SAM Maslow Pyramid" (from bottom to top) and are anticipating where Flexera goes with SAM:




Towards a SAM Operations Hub: transparency and KPIs on operations (***Planned for 2022 Q4***)

Let's start with the foundation: there are key questions that any SAM Manager must have answers to before even thinking about compliance or optimization... This structure anticipates the *SAM Operations Hub* that will provide KPIs and answers to these questions

Can I trust my inventory?

Are my inventory import system tasks successful?

This should be the first check of the day. The system tasks screen (***Out of the box***) (Only show last run = Yes, Status = failed) will give the right data and the logs.

Are my beacons reporting correctly?

Beacons are key components of the ITAM architecture that transfer all inventory and discovery files run inventory tasks, schedule business imports, upload logs... A beacon could stop reporting due to the Beacon Engine Service being stopped, the upload scheduled task disabled, authentication issues (agents can't connect to the Beacon inventory web service and upload NDI files...).

The Beacons screen (***Out of the box***) gives the list of beacons with status, pending upload files data. Each beacon detail record gives detailed upload status.

Is my inventory exhaustive? Does vCenter report VMs that are not inventoried?

Virtual Machines Inventory Gaps from vCenter report catches the VMs reported by vCenter imports but not inventoried with an agent.

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Allocations & Exemptions for Optimal License Position

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2. License priorities
3. Allocations / Exemption design
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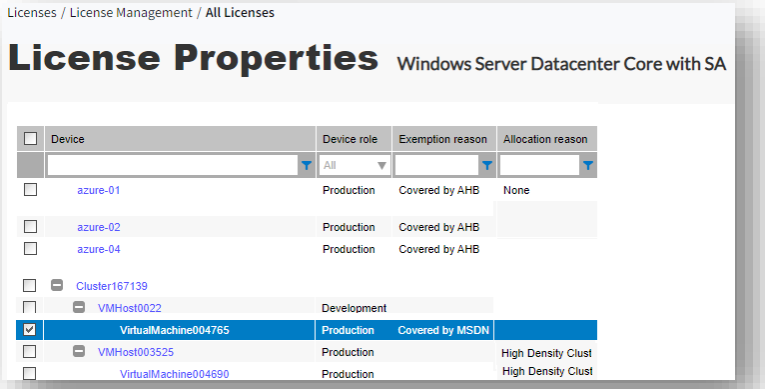
Business Context: SAM is complicated!

- Licensing is reach in complexities
  - Overlapping Licenses
    - Multiple ways of licensing applications on devices (Oracle NUP / Proc, SQL Server-CAL / Cores, IBM DB2 for test servers…)
  - Multi server bundles
    - The bundling doesn't work across servers (would be too dangerous)
  - Complex licensing / optimization rules
    - Non prod servers when accessed only by users with MSDN subscriptions for Microsoft applications
    - Optimization based on VM densities on hosts (Windows Server) or clusters (RHEL)
- Need to help the Reconciliation algorithm, influence
  - With allocation **or** exemptions



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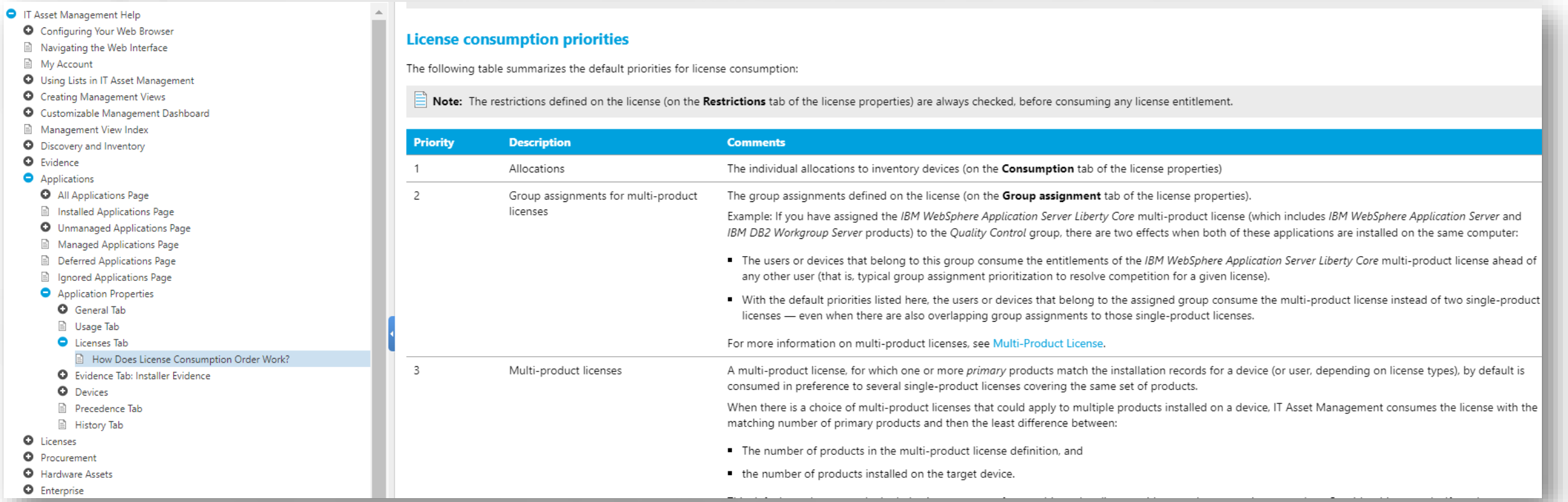
License Priorities

- Documented in the License Consumption Priorities section
  - Allocations and exemptions are on top



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Allocations and Exemptions Design

- Allocation forces the link between a device and the consumed license
- An allocation can be
  - Allocated (cso triggered if device is installed for the license)
  - Permanent (always consumes)
  - Awaiting inventory (sort of “license reservation”)
- You can force the consumption while allocating (overridden consumption) at the “level where consumption sits”. (host, device etc.)
- A new “Allocation reason” column exists (2022R2.1)
- Not available in all license types
- An exemption is an allocation that consumes 0

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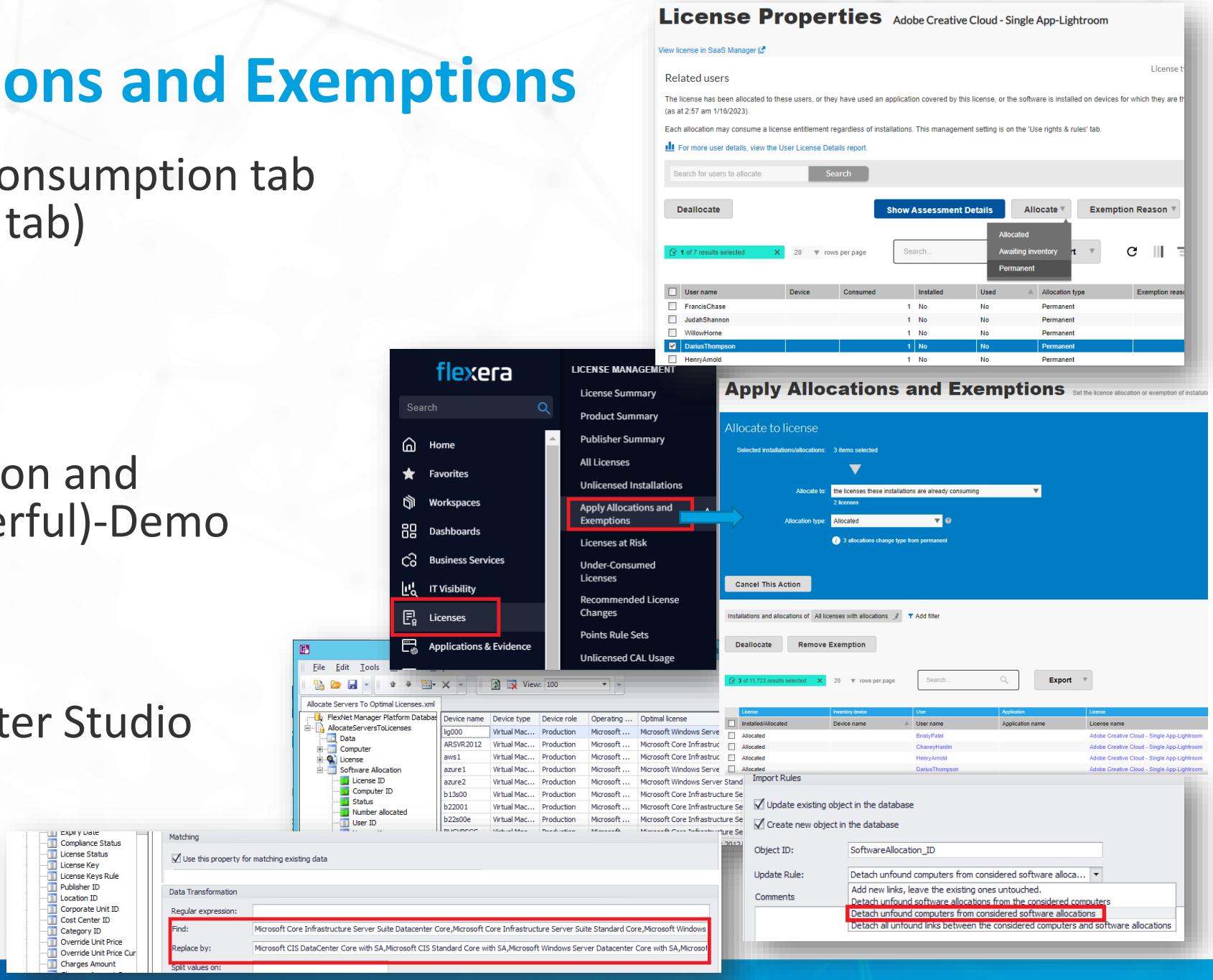
Setting up Allocations and Exemptions

- From Screens (License consumption tab or Device / user License tab)
  - + Exemption By Role
- From the “Apply allocation and exemptions” (very powerful)-Demo
- With the Business Adapter Studio
  - Use the data translation



Use Cases (demo)

- **Any** named user license
  - Case of Adobe Subscriptions
- MSDN
  - Current design of SKU is questionable (will be stopped by March)
  - Create MSDN covering Visual Studio (+ eventually Office Pro Plus)
  - Create Microsoft Server licenses with the exemption by role (if ALL non prod servers are accessed by users with subscriptions)
  - Eventually, create a license covering all products using the intelligent restriction on non prod server of eligible data centers
- Cross server bundle (SQL Server for SCCM database or DB2 for ILMT)
  - Exempt db the servers
  - Or allocate sever with supplementary application to the license that will cover it even in absence of primary product.
- Windows Server Optimization. See January SAM Best Practice Webinar (approach 2)

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Tips and tricks

- Avoid conflicting allocations or allocations and exemptions!
  - You will be back to a “random coverage across licenses” situation
  - Exemptions will always win, the “other license” will never consume
- In case of “100% of devices need to be allocated”, use the “Intelligent restriction” introduced in 2022R2
  - Prod / non prod (IBM, Tibco)
  - Proc / NUP (Oracle)
- Prefer the Business Adapter approach, use REST APIs calls => Update through Business Adapters if you are Cloud
- Prefer the “Permanent” allocations to the “Allocations always consume” license option
- Document and justify what you do!

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Coming Next: Intelligent Allocations and Exemptions

- Same approach as Intelligent License Restriction
  - Use of a report (device or user) to define a target
  - Target is assessed for each reconciliation
- Will combine with addition of the Active Directory Groups to reporting
  - Allows to report on license consumptions based on authorization groups
  - Opens to great possibilities for application users' licenses

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Thank you!

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