



cockpit
IT Service Manager

Infrastructure - Software and license management

FAQ document

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Introduction

I. Objectives

- To inventory software packages and track their use (installation on equipment, version, etc.)
- To inventory licenses and monitor their evolution (allocations to users, software, etc.)

Menu management

I. Categories

Menu: Infrastructure > Software > Categories

Objective: Set software categories

Operation: From the menu to edit or create a category

Main fields	
Fields	Information
Description (mandatory)	The description is the name of the category, it's unique. In the configuration menu the category appear under this description. The description appears in the lists when a category has no translation. 1 to 255 characters
Organizations	Select the organizations where the software category appears.
Translations	Only one translation can be associated with each language. The translation used depends on the user's language.
Software	Select the software belonging to the category. Only the software for the organization can be selected.

Deletion management:

When a category associated with softwares is deleted, it is proposed to associate the software with a new one or to leave it uncategorized.

II. Licenses

Menu: Infrastructure > Software > Licenses

Objectives:

- Set up the licenses and link them to the software and equipment
- Track the number of licenses used and their allocations

Operation:

In the menu, the columns below signify:

- Number: Number of times the license can be allocated
- Equipment: The sum of the allocations on the equipment using the license

With these 2 columns we can see if a license has been allocated too many times.

Settings: From the menu to edit or create a license

Main fields	
Fields	Information
Organization	To select an organization If the "Share" option is enabled, the license can be selected from the software of

	<p>other organizations.</p> <p>It is not possible to modify the organization of a license associated with equipment or software.</p>
Name (mandatory)	License name from 1 to 50 characters
License number	License number from 1 to 50 characters
Expiration date	<p>License expiration date.</p> <p>In order to receive notification when the license has expired, you must enable notifications in the user's preferences.</p>
Expiration notification	<p>Allows receipt of notification X days prior to license expiration date.</p> <p>You must enable notifications in the user's preferences.</p>
Number	<p>Number of times the license can be used, for example: number of installations allowed by the license.</p> <p>The field is disabled if the "Unlimited" option is active.</p>
License mode	<p>License per piece of equipment: From the "Equipment" tab, each equipment selection increments the "Allocations" counter</p> <p>License per user: Manually specify the number of license allocations</p>
Equipment	<p>To select the equipment of the organization for association with the license.</p> <p>When equipment is selected with user license mode, this does not affect the "Allocations" counter which is managed manually.</p> <p>To access the "Equipment" tab, the operator's profile must have at least the rights to view the equipment.</p>
Software	To associate the license to one or several software packages of the organization

Note 1: Changing the "Software" part of the licenses affects the "Licenses" part of the software; these are different views but the same data.

Deletion management:

When equipment or software is removed from a license, only the links with the licenses are deleted, the equipment and software are not deleted.

III. Software

Menu: Infrastructure > Software > Management

Objective:

- To inventory, search and list software in Cockpit IT Service Manager.
- To monitor the use of the software (licenses assigned to the software, software installed on equipment, etc.).

Principles: The software can be referenced manually or automatically via software inventories of server-based equipment

A. Settings

From the menu to edit or create software

Main fields	
Fields	Information
Organization (mandatory)	The software is mono-organization. It is not possible to modify the organization of software associated with equipment or licenses.
Category	Selection of a category
Name (mandatory)	Software name from 1 to 250 characters The name of software entered by an automatic inventory can be modified. When the automatic inventory runs, it recognizes software that is already referenced and does not reset its name if it has been manually changed.
Version (mandatory)	Software version from 1 to 50 characters The software version populated by an automatic inventory can be modified. When the automatic inventory runs, it recognizes the software already referenced and does not reset its version if it has been manually modified.
Provider	Shared suppliers of other organizations can be selected.
Support contract	Shared support contracts from other organizations can be selected. Only support contracts belonging to the selected provider can be chosen.
Equipment	In the "Equipment" tab, select the equipment where the software is installed. Only the equipment for the selected organization is offered. The software referenced during the inventories is automatically entered into this tab. To access the "Equipment" tab, the operator's profile must have at least the rights to view the equipment.
Licenses	Only the licenses of the software organization can be selected.
Support provider and contract	The "Support" tab only appears in the view mode of the software fact sheet. The tab contains all the details of the provider and the support contract associated with the software. In order to see this tab, the operator's profile must have at least read access to the providers.

Note: The providers and support contracts are set in the "Infrastructure > Providers" menus.

B. Software merge

Objective: To merge the data of 2 software packages in order to conserve only one (following a version upgrade for example) while keeping the links between the software and the equipment and licenses.

Operation:

- To edit the target software, i.e. the software that will remain after the merge
The "Merge" button appears provided that:
 - The software has been backed up at least once.

- The software has not been referenced by an automatic software inventory.

This restriction is necessary in order to ensure uniqueness of the software loaded by the inventories.

- Click the "Merge" button, select the software that will be merged and click "Add."

| Note: Only software from the same organization can be merged together |

- The data on the "Details" tab of the target software is retained (category, name, version, provider, etc.).
- The data on the "Equipment" and "Licenses" tabs of the merged software are added to the target software. There is therefore no data loss for these 2 tabs.

C. Data recovery

Objective: To restore the original name and version of a piece of software as reported by the automated inventories.

Operation:

- To edit software where the name or version has been modified

| Note: The "Restore name and version" button is only available for software referenced by automated software inventories and whose name or version have been changed manually. |

- Click on the "Restore name and version" button, the 2 fields are restored to their original state, i.e. from the software inventory

D. Types of software exports

From the software management menu, there are 2 types of export

- "Export - Software": List of software and configuration
- "Export - Software - Installations": List all software installations on each equipment

E. View software

Objective: To view a software fact sheet and display additional information relating to the issue mode

Operation: From the menu click on the "View" button of a piece of software.

- The "Support" tab contains all the provider and support contract details associated with the software.
- From the "Equipment" tab, it is possible to access the fact sheets of equipment linked to the software.
- From the "Licenses" tab it is possible to access the fact sheets of the licenses linked to the software.

F. Automated inventories of the software

Menu: Infrastructure > Equipment > Management

Objective: To run an automated software inventory

Principles:

- The automated inventories are executed by the inventory engines configured at the organization or equipment level.
- The connection between the inventory engine and the equipments must be configured and operational.
- The automatic software inventories work by equipment type with the following operating systems:
 - Linux with either rpm or dpkg
 - BSD with pkg_info
 - Windows WinRm
 - Windows WMI, in this case only the software installed via Windows Installer is inventoried

Operation:

- In the equipment list, click on "Software inventory" from the equipment context menu
- A message appears to indicate the inventory result (completed or error)

IV. View per equipment

Menu: Infrastructure > Equipment > Management

Objectives: View software and licenses for a piece of equipment

Operation:

To view software and licenses related to a piece of equipment:

- Open the fact sheet of a piece of equipment in read-only mode by clicking on "View"
- The software and licenses associated with the equipment are in the "Software" tab
- Click on the "View" button of a piece of software or license to see the details

V. Deletion management

- When equipment or a license is removed from a piece of software, only the links are deleted, the equipment and licenses are not deleted.
- When software loaded by automatic software inventory is uninstalled from a piece of equipment, at the next inventory the software will no longer be linked to the equipment but it will still exist in the database. It will therefore be visible in the software management menu.
- When a category is deleted, it disappears from the software with which it was linked without any other impact on the software.

Importing software and licenses

Menu: Infrastructure > Software > Import Software

Objective: To bulk import software into Cockpit IT Service Manager instead of one by one

Operation:

- Fill a file with information from software packages to be imported
- Import and evaluate the file in Cockpit IT Service Manager

I. Creation of the import file

2 template files can be loaded from the menu:

- A template in Excel format: Only imports of CSV files are handled, it will be necessary to export the file to CSV format from the spreadsheet
- A template in CSV format

Main fields	
Fields	Comments
Organization (mandatory)	The field must not be empty, but the contents of the field will be replaced by the organization selected during the import An import of software packages is therefore carried out on one organization at a time
Name (mandatory)	Software packages can have the same name if the version is different From 1 to 250 characters
Version (mandatory)	Two software packages cannot have the same version if they have the same name From 1 to 50 characters
Category (optional)	The category must exist in the organization selected
Provider (optional)	The provider must exist in the organization selected
Contract (optional)	The support contract must exist and belong to the provider selected
Comments	Free text field up to 255 characters

Note 1: The optional fields are not blocking for the import.

Example: If the provider does not exist the field will be left empty and the software will be imported.

Note 2: Cockpit IT Service Manager not created by element

Example: If the category (optional field) specified in the file does not exist, it is not created in Cockpit.

Main fields	
Fields	Comments

Organization (mandatory)	The field must not be empty, but the contents of the field will be replaced by the organization selected during the import An import of software packages is therefore carried out on one organization at a time.
Name (mandatory)	Licenses can have the same name if the number is different
Number (optional)	Two licenses cannot have the same number if they have the same name
Number (optional)	Leaving the field blank defaults to "Unlimited"
Expiration date (optional)	In the format DD.MM.YYYY Leaving the field blank defaults to "No Expiry"
Comments	Free text field

II. Importing the file

Fill in the following fields:

- Character sets: Select the character set or encoding of the file to be imported.
The "Auto" option is suitable in the majority of cases.
- Separator:
 - CSV file: comma, semicolon or tab
 - CSV file imported from an Excel file: use the semicolon
- Organization: Select target organization

The selected organization replaces the organizations that may have been entered in the file.

Consequently, importing software or licenses can only be done on one organization.

Click the "Upload" button, select a CSV format file.

III. Evaluation of the file

Cockpit IT Service Manager evaluates the file and returns the following information:

- The character set (encoding) used to read the file
- The number of software packages or licenses containing errors
- If the file is considered empty

A table summarizes the items to be imported, each line corresponds to a software package or a license:

- The status of the item indicates whether it can be imported or not:
 - OK: the item can be imported
 - Error: the item cannot be imported
- Click on the line that has an error, the details of the software or license are displayed below and the error fields are indicated. Correct the fields by entering correct values until the status changes to "OK".

| Note: the software or licenses with status "OK" can be modified in the same way |

- Click on "Delete" to remove an item from the import

When all the lines of the import have the status "OK", click on "Import"

IV. Errors during imports

A. The Excel file is not recognized by the application

Only imports of CSV files are handled, it is necessary to export to CSV format from the spreadsheet.

B. The resulting import is empty

- The selected character set is not recognized
- For CSV files exported from an Excel file select the ";" separator

C. The import does not take into account the organization indicated in the CSV file

The organization of the licensing software is the same for the whole import, it is defined before uploading the file.

If another organization is indicated in the file, it is not taken into account.

When importing software or licenses of different organizations, it is therefore necessary to do an import for each organization.

D. The accents in the import display incorrectly

Make sure that the character set selected matches the character set of the uploaded file.

E. Is it possible to use software and license exports for the imports?

Yes, follow the steps below:

- Export the software or licenses to a CSV format file
| *Note: For software, use an "Export - Software" export* |
- Make sure that the items to import exist (categories, etc.)
- Import the CSV file (no file modification required) into another Cockpit IT Service Manager

Document end