Using FlexNet Manager Suite for IBM Sub-capacity PVU Licensing

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FLEXERA SOFTWARE™
FlexNet Manager® Suite
for Enterprises

Using FlexNet Manager Suite for IBM Sub-capacity PVU Licensing

FlexNet Manager Suite 2015 R1 or later, used to determine a license position on IBM software, is currently accepted by IBM for sub-capacity reporting as an alternative to IBM License Metric Tool (ILMT), Tivoli Asset Discovery for Distributed (TAD4D) or IBM BigFix Inventory.

This acceptance is conditional on FlexNet Manager Suite being installed, configured and maintained correctly, and conditioned on FlexNet Manager Suite maintaining functional equivalence to ILMT. Enterprises wishing to take advantage of this acceptance must purchase and use both of the following Flexera products:

1. FlexNet Manager Platform 2015 R1 or later
2. FlexNet Manager for IBM

In addition:

3. The FlexNet Inventory Agent must be deployed and operational on all computers that are (or may be) running IBM software that is licensed on a sub-capacity basis
4. Frequent hardware inventory scanning for IBM PVU license calculations must be enabled at 30 minute intervals, including remote scans of VMware vCenter and Oracle VM Manager servers
5. The enterprise must complete IBM's formal registration and contract amendment process

Without these basic requirements met, an enterprise may not use FlexNet Manager Suite as an alternative to ILMT. Make sure that acknowledgement of these requirements is documented.

IBM acceptance is required to use FlexNet Manager for IBM to monitor sub-capacity PVU licensing. IBM now has a formal registration and contract amendment process.[1] To register with IBM and modify an existing IBM agreement to include use of FlexNet Manager for IBM, please contact IBM directly at CLREG@US.IBM.COM. Enterprises that have already executed such written contract modification terms are encouraged to confirm this with IBM.

It is important for enterprises to have this written acceptance on record. IBM is supportive of the Flexera Software program and simply needs to understand who is using FlexNet Manager for IBM for sub-capacity PVU licensing. For more information, please contact a Flexera Software representative.

Enterprises that have a PVU scanning frequency longer than 30 minutes are in violation of IBM's rules and will not be able to use FlexNet Manager Suite for sub-capacity reporting. Enterprises may set the PVU inventory scanning frequency to a value longer than 30 minutes only as a temporary measure for troubleshooting. In such an event, please ensure that a support case has been filed.

[1] The amendment may be accessed online here.

Configuring Discovery & Inventory

Install the FlexNet Inventory Agent on all IBM sub-capacity systems and configure the Inventory Beacon with the appropriate credentials to access inventory for vCenter and vSphere virtual infrastructure.

FlexNet Manager Suite automatically includes any systems consuming PVU licenses in the requisite high frequency hardware scans when configured. Enable this in the IBM PVU Scanning section of the Inventory Settings page (**Management > Discovery and Inventory > Inventory Settings**):

1. Enable frequent hardware scanning for IBM PVU license calculations
2. Enable remote scans against all known VMware vCenter and Oracle VM Manager servers
3. Add the "All devices consuming IBM PVU points" target to the list of targets enabled for PVU-related hardware scans.

For more information on configuring discovery and inventory for IBM sub-capacity PVU scanning, please see the section on IBM PVU Scanning in the FlexNet Manager Suite product documentation, which can currently be found in **FlexNet Manager Suite Help > Discovery and Inventory > Inventory Settings Page > IBM PVU Scanning Section**. This can also be accessed by navigating to the page and clicking the help icon in the upper right hand corner of the screen.

Alternatively, refer to the **FlexNet Inventory Agent and Managed Devices.pdf** located in the Product Documentation area of the Flexera Product and License Center.

Configuring Licenses

IBM licenses software for use in one of three defined regions:

- Region 1: North America & South America
- Region 2: Europe & Africa
- Region 3: Asia & Australia

Organizations that operate across regions should:

1. Define a location enterprise group structure within FlexNet Manager Suite in such a way that locations can be mapped to these regions.[2]
2. Ensure a process is in place to accurately set and maintain the location property on inventory device records.
3. Create separate regional license records for each product operated in multiple regions, and apply restrictions to ensure that each license will only cover software usage in that region.

Some products are ineligible for sub-capacity calculations. FlexNet Manager for IBM will create full capacity PVU licenses for these products by default when licenses are created from a SKU. If you are creating licenses manually, be sure to select a full capacity PURL template when creating licenses for sub-capacity ineligible products. The full list of products is available in IBM's Passport Advantage Sub-

[2] A structure having multiple locations mapped to each IBM-defined region is typical.

capacity Licensing Eligible Product Statement. You can find this and many other valuable resources about sub-capacity licensing on IBM's Passport Advantage Virtualization (Sub-capacity) Licensing website.

If you have any questions about calculating IBM PVUs, please refer to IBM's Virtualization Capacity License Counting Rules site. Many documents are available on this site that detail the counting methodologies for different platforms and scenarios. It is also a great gateway to other sub-capacity resources, such as the PVU Tables and Manual Calculation of Virtualization Capacity spreadsheet.

In addition to standard license use rights configurations, make sure that bundles are actively managed as well. Use the license exemptions feature to exclude installations that should not be counted against licenses because they are included as part of another license, e.g., DB2 Enterprise Server is a supporting program of ILMT. In FlexNet Manager Suite 2016 and later, the license modeling capability has been enhanced to automatically handle many IBM scenarios without applying exemptions or additional configuration. Some scenarios will still require user intervention.

More information on IBM bundle use rights and related restrictions can be found in the License Information Document (LID) for your product. You can search these LIDs on the IBM's License Information Document Search page. For more information on the license exemptions feature, please refer to system documentation.

Periodic Reports

The IBM Passport Advantage Agreement provides details of typical reporting obligations:

> ***1.12 Compliance Verification***
>
> *Client will i) maintain, and provide upon request, records and system tools output, and access to Client's premises, as reasonably necessary for IBM and its independent auditor to verify Client's compliance with this Agreement, including Machine Code and Program licenses and metrics, such as sub-capacity usage, and ii) promptly order any required entitlements and pay additional charges at IBM's then current rates, (including uses in excess of Client's authorizations or entitlements, and associated IBM Subscription and Support and Selected Support), and other liabilities determined as a result of such verification. These compliance verification obligations remain in effect during the term of this Agreement and for two years thereafter. Client is responsible for retaining adequate records. If Client's records are inadequate to determine IBM Subscription and Support or Selected Support charges, IBM's charges for any excess usage will include two years of associated maintenance and IBM Subscription and Support or Selected Support.*
>
> ***1.14 Client's Reporting Responsibilities***
>
> *For all PVU based EP licenses […] Reports must be prepared at least once per quarter.*

To make sure that IBM's sub-capacity reporting requirements are met, the following items should be saved and archived at least once each reporting period:

1. IBM License, Inventory, and Compliance Reports from FlexNet Manager Suite.
2. Records substantiating license consumption details that have been manually calculated and stored in FlexNet Manager Suite.
3. Records of scripts and other tool output that may have be used to gather license consumption details.

Although some reports provided by FlexNet Manager Suite are very similar to ILMT, there are differences. It is not the intent of Flexera to copy ILMT, nor is it required to meet IBM's sub-capacity reporting requirements.

Enterprises may have additional reporting requirements beyond typical sub-capacity reporting requirements as part of their IBM agreements that will need to be separately addressed, e.g. License Management Option (LMO) reports.

At the end of each reporting period, export and save the following reports to both CSV and PDF (optionally, XLSX):

- **Reports > License Compliance > Licenses > IBM PVU License Consumption:** Lists the software covered by IBM PVU licenses and the license consumption resulting from inventory imports.
- **Reports > Discovery and Inventory > Inventory > IBM PVU Overridden Inventory:** Lists computers consuming from IBM PVU licenses where the computer inventory has been manually modified.
- **Reports > Discovery and Inventory > Inventory > IBM PVU Out-Of-Date Inventory**: Lists computers with incorrectly configured inventory agents, or those for which there has been no inventory gathered in the previous time interval you select for the report.
- **Management > License Compliance > Compliance > Unlicensed Installations** (filter by **Publisher = IBM**)**:** Lists installations of IBM software for which an applicable license has not been identified.

The enterprise should export each report once at the end of each reporting period and archive them in a safe place where they will be available for at least 2 years in the event of an audit. Ensure that the reporting period to which the reports apply is clearly identified in the name of the folder or zipfile in which the reports are stored, or perhaps even in the names of the files themselves. Enterprises may use a reporting period that works for them, provided that reports are generated at least once per quarter. Many will be best suited by a monthly reporting period.

Digitally sign generated reports so that proof can be provided of who approved the report and when that was done in the future if necessary. Tools such as Microsoft Excel, Adobe Acrobat Reader DC could be used for signing Excel and PDF files. Alternatively, your organization may have a preferred tool for managing digital signatures which can be used.

After archiving these reports, each PVU license included in the reports can have the peak consumption reset for the next reporting period. Do so by opening each license and saving the peak consumption to 0. The next time that license reconcile is run, the peak consumption will be updated to reflect the current consumption.

Peak PVU consumption should be reset once after the initial implementation and configuration of FlexNet Manager Suite. After this time the peak should only be reset at the start of each reporting period.

If optimizations such as bundling or other exemptions are applied during a reporting period these may still be included in the peak consumption for that reporting period. Exclusions should be noted in the periodic reports. Once peak PVU consumption is reset the following reporting period will reflect the optimized consumption.

Frequently Asked Questions

Q: We installed FlexNet Manager for IBM and have been using it as a substitute for ILMT since April 2015 but we don't have a contractual amendment from IBM in place. Do we really need to register with IBM?

A: Yes. It is important to register with IBM to stay in compliance with the terms of the program.

Q: We are using FlexNet Manager Suite, but we do not have FlexNet Manager for IBM. Do we really need FlexNet Manager for IBM?

A: Yes, FlexNet Manager for IBM is a requirement for using FlexNet Manager Suite in lieu of ILMT. Several key capabilities required for IBM sub-capacity PVU licensing are only available as part of FlexNet Manager for IBM, including the IBM PVU sub-capacity license calculations and inventory scanning.

Q: Can we use the standalone agent (aka NDTrack.exe) or zero-touch to collect inventory for IBM systems?

A: No, the full Flexera Inventory Agent must be deployed to the systems in scope for sub-capacity PVU licensing in order for FlexNet Manager for IBM to collect inventory and calculate peak consumption in a manner consistent with IBM's requirements.

Q: Can we install the full Flexera Inventory Agent on our IBM servers using Adoption through the Web UI?

A: Great question. Yes, all normal inventory deployment rules apply, such as enabling root credentials in the password store and validating that the agent is reporting inventory when the adoption is completed.

Q: Can we deploy the agent package using our existing deployment tool such as Altiris, SCCM, Chef, Casper, Blade Logic or any other tool?

A: Yes, however you must ensure that you deploy the full Flexera Inventory Agent that installs the services/daemons and not just the NDTrack binaries.

Q: The 30 minute scan seems excessive. Can we change the setting to 4 hours now and set it to 30 minutes when asked for a report?

A: No, IBM requires that hardware inventory is gathered every 30 minutes. Enterprises may set the PVU inventory scanning frequency to a value longer than 30 minutes only as a temporary measure for troubleshooting. In any such event, please ensure that these cases are well documented.

Q: Can I use SCCM, ADDM or my other existing inventory tool as a data source instead of installing the Flexera Inventory Agent?

A: No, IBM does not accept inventory from any other tool for IBM sub-capacity PVU reporting. You may only use the Flexera Inventory Agent or ILMT to collect inventory on the systems that will be included in IBM sub-capacity PVU reporting. You may use any method for collecting inventory for systems not running IBM sub-capacity PVU licensed software.

Q: Can I use some method other than Flexera's VMware Inventory to collect virtual machine inventory, like ESXQUERY?

A: No. If a virtual machine migrates to a new host, IBM expects that the most expensive configuration is licensed his is tracked by FlexNet Manager for IBM to calculate the "high water mark" of PVU consumption. You can still use ESXQUERY to gather hardware and software inventory, but you can't use it for IBM specific license compliance. ESXQUERY is a services tool not intended for use in a production environment. It is not a supported component of FlexNet Manager Suite.

Additional Resources

Amendment to International Passport Advantage Agreement

The latest Amendment to International Passport Advantage Agreement is available on the Flexera Software website.

FlexNet Manager for IBM Datasheet

The latest FlexNet Manager for IBM Datasheet is available on the Flexera Software website.

For more information on IBM Sub-capacity Licensing

IBM Passport Advantage Agreement

Passport Advantage Sub-capacity Licensing Eligible Product Statement

Passport Advantage Virtualization (Sub-capacity) Licensing

Virtualization Capacity License Counting Rules

Manual Calculation of Virtualization Capacity

PVU Tables

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