

SAM Monthly Best Practices Webinars

*Session 24: Publisher Hub
Intelligent Allocations & Exemptions*

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Previous sessions [\(see in SAM Best Practice Hub\)](#)

- [July 21 session : FNMS 2021R1 content and Oracle Optimization](#)
- [September 21 session : RedHat, Microsoft Windows and SQL server optimization](#)
- [October 21 Session : Everything about Oracle](#)
- [November 21 session : Metering in FlexNet Manager: collection, management and optimization](#)
- [February 22 session : Java and Windows Server Optimization report](#)
- [March 22 session: Managing unrecognized applications](#)
- [April 22 session: Managing Hybrid Applications in SaaS Manager and Flexera One ITAM](#)
- [May 22 session: Customization and creating automations in Flexera One ITAM and FlexNet Manager Cloud](#)
- [June 22 session: Integrating ITAM & FlexNet Manager on Premise with a CMDB](#)
- [July 22 session: Management of Dockers and Kubernetes containers in Flexera One ITAM / FlexNet Manager](#)
- [August 22 session: Reporting in ITAM: Web, Cognos, Dashboards customization, next steps...](#)
- [September 22 session: Managing SAM Operations in project and run phase in ITAM / FlexNet Manager](#)
- [October 22 session: ITAM & SAM - Vision and next steps](#)
- [November 22 session: Flexera One ITAM / FlexNet Manager 2022R2 features deep dive](#)
- [December 22 session: Managing IBM PVU and VPC Licensing](#)
- [January 23 session: A full optimal license position for Windows Server and CIS in one hour!](#)
- [February 23 session: Using allocations and exemptions for an optimal license position](#)
- [March 23 session: the SAM Optimization Hub](#)
- [April 23 session: the SAM Operations Hub](#)
- [May 23 session: Keep Java under Control with Flexera ITAM!](#)
- [June 23 session: Flexera Business Adapter Studio for integrations and automations!](#)
- [July 23 session: FlexNet Manager 2023R1 and the new Applications Publishers screen](#)
- [August 23 session: Management of Streamed Applications \(Citrix, Horizon, App-v...\)](#)

Agenda

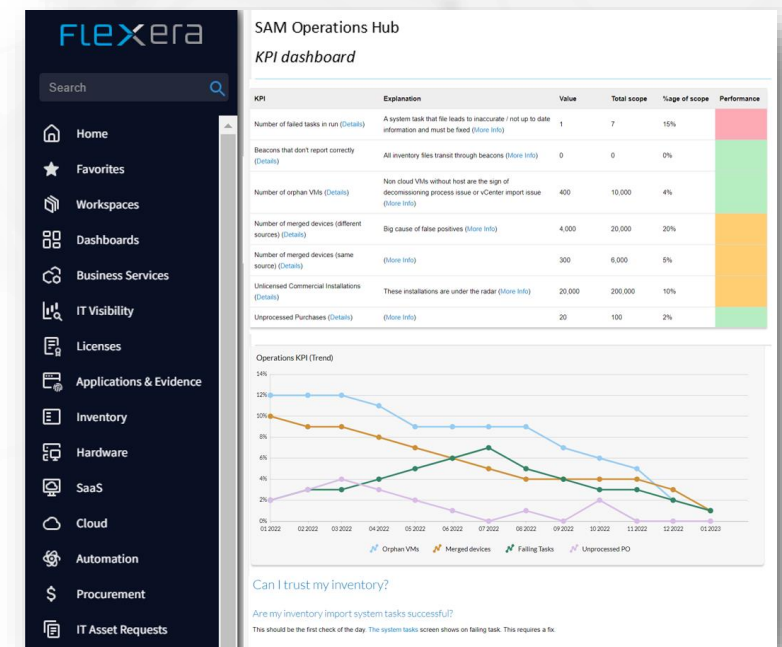
1. Last session's pointers and answers to questions
2. News
 1. Updates in the Best Practice Hub
 2. ITAM 2023R1.4.
3. New Features for ITAM R1.4
 1. SAM Publisher Hub
 2. Intelligent Allocation & Exemption (+ AD group reporting object)

Last Session: Managing Streamed Applications in ITAM

- Useful pointers
 - Recording and PowerPoint: [here](#)
- Answers to questions
 - For non persistent VDIs you mentioned templates are inventories. If using Flexera agent inventory source does this mean you need to ensure Flexera agent installed on all the VDI templates?
 - Inventorying all templates is necessary if you want the application data to be correctly passed to the VDIs... then users. The VDI inventory (Citrix Broker Service) links the VDIs to the templates
 - if you install the FlexNet agent on the VDI template, won't all of the non-persistent VDI clones created from that template have the agent installed and each will create an inventory device record?
 - Non persistent VDIs are not created as inventory devices (while persistent ones are VMs)

News

- ITAM 2023R1.3
 - Sept 13th: bug fixes, AD Group reporting object
- ITAM 2023R1.4
 - Oct 11th.
 - This session
- The “[Best practice Hub](#)”
 - Gives many pointers to existing best practice and visibility on the 3 coming Hubs.
 - 2 new solutions on importing [Citrix](#) and [Microsoft RDS CALs](#) data.
- Please check if you received the
 - Flexera August ITAM Newsletter



Flexera ITAM Best practice information available in Flexera Community

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Apr 19, 2022 02:40 AM

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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:

- Provide data and KPIs to monitor the health of your SAM Project. The custom reports will gradually be included in the **SAM Operations Transparency Hub**... Planned for 2023 Q1
- Provide transparency on your SAM data (usage, Oracle instances and options details, overview on SAP inventory...). The **SAM Data Transparency Hub** is planned for 2023 Q2
- Provide the high end value that does beyond compliance, with a focus on Optimization. Most of reports have been productized in 2021/2022. The **SAM Optimization Hub** delivered in 2022 Q4 summarizes and articulate these reports.

SAM Publisher Hub

Why the SAM Publisher Hub?

- ITAM has an “Object Centric” view of the SAM World (Purchases, Contracts, Licenses, Installed applications), which makes sense in many cases
- Business objects (Purchases, Contracts, Licenses) are linked to the vendors (that can be created through purchase imports) that are not normalized.
- Customers are organized “per Application Publisher” for compliance / contract Management with Microsoft, Oracle or IBM SAM Managers.
- We need to position the application Publisher in the center of the SAM game.
- Through screens (information + process) and a dashboard
- Our customers will be able now to answer the simple but complex to address “What Publisher matters to me?” question

Managing Technology Portfolio Effectively

SAM Publisher Hub

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- Vendor to Publisher normalization
- New Application Publishers Screen

2023R1.1

- Application Publisher-centric full picture on SAM
 - Inventory (with trend)
 - Compliance (with trend)
 - Contracts and upcoming renewals
 - Spend by quarter / contract
 - Unrecognized evidence
 - Drill down to new Publisher screen and detail
- More info in the [Best practice Blog](#)

The screenshot displays the SAM Publisher Hub interface. On the left is a dark sidebar menu with the Flexera logo and a search bar. The menu items include: Home, Favorites, Workspaces, Dashboards, Business Services, IT Visibility, Licenses, Applications & Evidence, Inventory, Hardware, SaaS, Cloud, Automation, Procurement, and IT Asset Requests.

The main content area is titled "SAM Publisher Hub" and features several data visualizations:

- Top 5 Over and under compliance:** A bar chart comparing Purchased, Consumed, and Balance for SQL Server Enterprise, Windows Server Professional, Visio, and Project.
- Compliance Trend (Top 20):** A line chart showing trends for SQL Server, Windows Server, and Linux from Q1 2022 to Q4 2022.
- Optimization:** A bar chart titled "Save By Taking Action: Top 5" showing values for ES, E3, Visio Plan 1, Project Plan 1, and E1.
- Optimization trend:** A line chart showing trends for SQL Server, Windows Server, and Linux.
- Installed Applications:** A pie chart showing the distribution of five products: product 1 (10.7%), product 2 (15.6%), product 3 (21%), product 4 (28.9%), and product 5 (23.6%).
- Installation trend:** A line chart showing trends for SQL Server, Windows Server, and Linux.
- Upcoming Contracts Renewals:** A bubble chart showing renewals for May 2023, July 2023, September 2023, November 2023, and January 2024.
- Spend over time / Contract (quarter over 3 years):** A bubble chart showing spend trends.
- Spend trend:** A line chart showing trends for SQL Server, Windows Server, and Linux.

At the bottom left, there is a table with the following structure:

	Q1-20	Q2-20	Q3-20	Q4-20	Q1-21	Q2-21	Q3-22
Contract							
None	10K						
EASL							
Select A							
Total spend							

SAM Publisher Hub – Screens, Vendor normalization

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- Vendor to App Publisher normalization
 - Links business information (contracts, purchases, licenses) to application publishers
 - Calculated Application Publisher (Can be Overridden)
- Vendor screen extensions including Licenses, Publisher tabs
- Application Publishers screen
 - All app publisher’s KPIs in the grid (e.g., total spend, number of commercial installations active contracts, upcoming renewals, number of licenses)
 - All tabs to understand data and perform processed (e.g., installed applications, unlicensed installations, spends by quarter / contract)

Application Publishers Any publishers which applications can be recognized, regardless of whether they are installed

22,247 results returned 20 rows per page

Publisher Name	Total Spend (USD)	Installations (Commercial)	Containers (Commercial)	Installations	Containers	Licenses	Contracts	Expiring Contracts (90 days)	Processed Purchases
Microsoft	\$5,555,440.00	804	0	4,158	0	3	2	1	1
Adobe	\$2,250,000.00	1	0	38	0	1	0	0	1

Publisher properties Microsoft

Spends

Summarized spend over five years

Spend	2018 (USD)	2019 (USD)	Variation (%)	2020 (USD)	Variation (%)	2021 (USD)	Variation (%)	2022 (USD)	Variation (%)	2023 (USD)	Variation (%)
Total	\$0.00	\$0.00	0	\$0.00	0	\$0.00	0	\$5,000,000.00	100	\$555,440.00	-88.89

Detailed spend by contract over three years

2 results returned 20 rows per page

Contract	Q2 2020 (USD)	Q3 2020 (USD)	Q4 2020 (USD)	Q1 2021 (USD)	Q2 2021 (USD)	Q3 2021 (USD)	Q4 2021 (USD)	Q1 2022 (USD)	Q2 2022 (USD)	Q3 2022 (USD)	Q4 2022 (USD)
Microsoft Select	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,000,000.00	\$0.00	\$0.00
None	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- General
- Installed applications
- Licenses
- Contracts
- Purchases
- Vendors
- Spends
- Unlicensed Installations
- Unrecognized Installer Evidence
- Unprocessed Purchases

Intelligent Allocations & Exemptions

Intelligent License Restriction

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- Today complex licensing rules require hours of effort in manual allocations from the screens
 - Production / Non-Prod (IBM)
 - Server / Desktops (Java)
 - Specific contracts (MSPs)
 - “High or low density” clusters (Windows Server)
 - Defined populations of servers (Oracle NUP / Process servers)
- SAM users can modify any user or computer report to define a restriction scope

License Properties IBM InfoSphere Datastage PVU For Non-Production

Possible issues for this license 1

1. All license entitlements must be covered by current maintenance. Please remove the excess or cover the shortfall.

Scope restrictions License type: IBM PVU

Entitlements under this license can be consumed only within enterprise groups listed below, and their sub-groups. Use this scoping to enforce legal restrictions on a license. If the list is empty, the license may apply throughout the enterprise.

Search for groups to add Search

Computer group Non-Production devices Search

Remove

0 results returned 20 rows per page

Group type	Group name	Parent path
No results		

Save Close

Compliance Identification Use rights & rules Applications Purchases 1 Financial Contracts Consumption Restrictions

Intelligent License Allocations and Exemptions

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- Allocations and exemptions are useful for license optimization
- It is possible today to define exemptions by Role and allocation manually or with a Business Adapter
- This feature allows to define an allocation or exemption group through device or user reports
- Membership to AD Groups will now be an option!

The screenshot shows the 'License Properties' page for 'Toad for Oracle Xpert'. The 'Allocations' section is expanded, and a 'Run report' button is clicked, opening a modal window titled 'Toad Oracle Experts AD Groups'. This modal displays a table of users and their AD group memberships.

User	AD Groups
<input type="checkbox"/> User name	Location AD Group Name
<input type="checkbox"/> Brad1	USA/Itasca, IL Toad Oracle Experts
<input type="checkbox"/> aamer	USA/Itasca, IL Toad Oracle Experts
<input type="checkbox"/> EPCTest12	USA/Itasca, IL Toad Oracle Experts

Below the modal, a 'Configure' window shows options for adding users and AD groups to the allocation.

Thank you!

About Flexera

Flexera delivers SaaS-based IT management solutions that enable enterprises to accelerate digital transformation and multiply the value of their technology investments. We help organizations ***inform their IT*** with definitive visibility into complex hybrid IT ecosystems, providing unparalleled IT insights that allow them to seize technology opportunities. And we help them ***transform their IT*** with tools that deliver actionable intelligence across an ever-increasing range of dimensions to effectively manage, govern and optimize their hybrid IT estate.

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