LAMUM Quick Start Guide

The purpose of this white paper is to provide a step by step guide for getting started with LAMUM. This will include:

1. Initial Settings,
2. Putting in Licenses to be monitored,
3. Viewing current checkouts for those licenses,
4. Using the direct-access portal,
5. Feature name aliasing.

I have included "Homework" at the end. Homework should be completed within 10 days, before Phase 2 training.

Initial settings

1. Go to Setting Tab

a. Click **Add New User**- add in a new LAMUM Users: first name, last name, login, password. For permissions check:
   - i. Admin- can do everything, except no access to Daemon Manager
   - ii. Manager- can see everything, $ values, and can edit but cannot add or delete line items.
   - iii. Email Alerts- only if you want to receive "Contract/Renewal" alerts (license key expiration alerts are handled on the UM side of the tool)
   - iv. If you leave all them unchecked, that User can "read only", and will not see any $ values.
   - v. Daemon Manager access is only available if you have both Admin and Manager checked.
   - vi. Add email address only if you wish to receive Email Alerts on renewals
   - vii. Enable Email Alerts under **Change Settings** if Email Alerts needed.

b. Global Settings
   - i. **Change Settings**- to add Mail server information for Renewal Alerts. Disregard if you will not be tracking Renewals initially.
   - ii. **Change Types**- to add additional items to drop downs in "Types". Must click **Submit** for each new entry:
     1. Tool Types (Defaults: Normal, Spares, Temp, FlexLM)
     2. Restriction Types (Defaults: LAN, WAN, Node, WAN-US)
     3. Purchase Types (Defaults: Subscription, Perpetual w/Maintenance, Perpetual wo/Maintenance,)
     4. Standalone Types (Defaults: Node, User)

Putting in Licenses to be monitored

Create a spreadsheet of the floating licenses to be monitored (only FlexLM initially). Include Vendor name, Tool Name, Expiration date, daemon name, license server name, port #. If Denial reports are required, you will also need the "absolute path" from the LAMUM server to the FlexLM Debug Log for that Vendor/Server. You may want to hold off on tracking Denials for now.

1. Here is a description for each field:

a. Vendor Name: choose a logical, easy to understand Vendor Name

b. Tool Name: you will have one Tool name for all features/tools at a given Port@Host. We recommend the following Tool Name convention: VendorName_Bundle, or VendorName_Tools, or VendorName_Suite. Stay with the nomenclature you adopt for all Line Items!

c. Expiration date: The Contract renewal date, which may or may not be the license key renewal date. (License key expiration is tracking separately)

d. Daemon name: each Vendor typically has their own unique daemon name. Appendix A has typical Vendor daemon names and port #'s

2. Adding a new Line Item

a Click **<u>Licenses</u>** Tab

  i. **<u>Add New Line Item</u>**

    1. **<u>Add New Vendor</u>** (assuming Vendor is not in the drop down)
      a. Only need a Vendor Name at this point
      b. Later you can attach Contracts and Documents (up to 9)
      c. Vendor Notes
      d. Address, etc.

3. Add New Tool (assuming Tool in not in the drop down)

a. This where you put in the VendorName_Bundle, VendorName_Tools.

4. Expiry date:

a. If you have the Renewal date, put that date in. Otherwise skip this. It defaults to one year out.

5. Quantity:

a. Put in "1" since this is 1 Bundle/Suite of Tools. Quantities of individual Tools are tracked on the Usage side.

6. PO#:

a. If you want to track the PO for this Line Item, put in the current PO #. If not, skip.

7. Tool Type:

a. Using the drop down pick a suitable "Tool Type" or leave blank. You may want to just select "FlexLM" as the Tool Type for now. It can always be changed later.

8. Purchase Type:

a. Using the drop down pick a suitable "Purchase Type" or leave blank. It is probably worthwhile to know if a Line Item is on Subscription or Perpetual, on or off Maintenance.

9. $$:

a. f you want to track $, otherwise leave blank

10. Installer:

a. Skip

11. Responsible Person:

a. If you want to track the person in your company responsible for this Line Item, get their name from the drop down. If the person's name is not in the drop down, you will have to add them in the Settings Tab, <u>Add New User</u> (1.a.i above)

12. License Number and Notes:

a. Skip for now

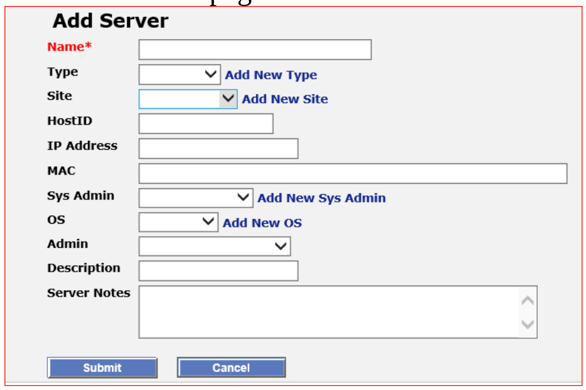
13. Now comes the fun part! For this Line Item, being a floating (networked) license, we want to use the Networked Box and complete as follows:

a. Restriction: using the drop down pick a suitable "Restriction". If it isn't in the List, go back to **<u>Change Types</u>** and add it (1.a.ii.2)
b. License Type: using the drop down pick a suitable "License Type", which should be FlexLM in this case.
c. Log file: put in the path to the Flex Debug Log only if you plan to track denials. You can add the this later if you want.
d. Select Port@Host (radio button)
e. Select **<u>Add New Port@Host</u>**

  iii. Complete the Add Daemon page:

    1. Daemon name (from Appendix A?)
    2. License server name (use short name to start. If that doesn't work, you may need a fully qualified name). If just one server, complete only the first Server **<u>Add</u>**. If a Triad, complete Server2 and Server3 fields.

a. Add New Server page

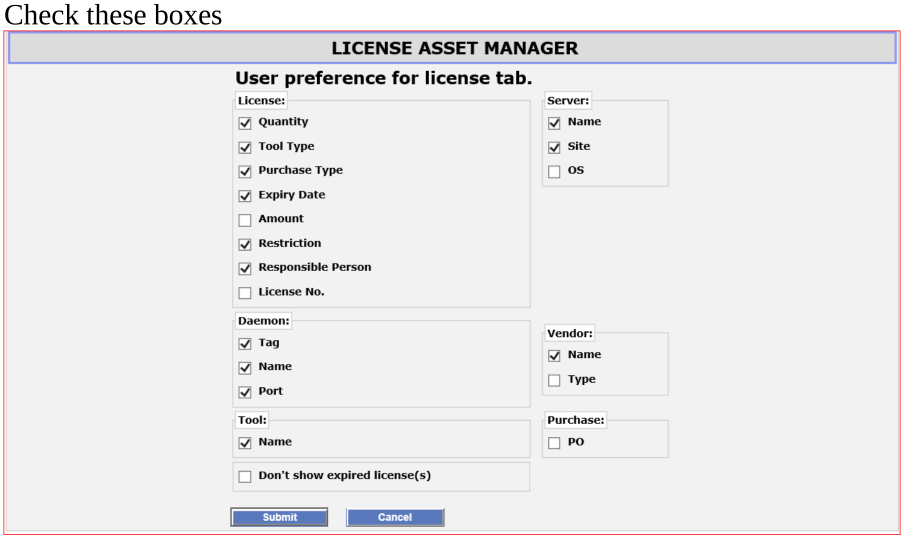


b. Insert Server name.
c. Select or Add Type
d. **Add New Site** (Where is the License server located? Acronyms are ok)
e. **Add New Sys Admin** if you want to know who is responsible for that License Server
f. Submit

3. Port # (from Appendix A?)
4. Tag: Tag is a User-friendly way of saying Port@Host. Use a naming convention as follows:
   a. If there is only one License Server for this Tool name- use the Vendor name as the Tag name
   b. If there are multiple License Servers for this Tool name- use the VendorName_SiteA, VendorName_SiteB, or you can use VendorName_LicenseServerA, VendorName_License ServerB, etc.
   c. Once you have established your naming convention, stick with it.

iv. Click **Submit** to save

f. You have completed the Add New Line. Click **Submit** to save.
g. View and verify the new Line Item.
   i. The Licenses Tab should now show the Line Item
   ii. Click "Configure_View" to select the data you want to see
   iii. Check these boxes



   iv. **Submit**
   v. Verify the data in the Line Item. Is it all correct? If not, change it now.
      1. Move the Line Item over to UM for monitoring
   vi. Click **Usage** Tab
   vii. Click **Monitor Update**
   viii. Now you should see the Line Item on the Usage/Home page, but status is Red. You can wait 15 minutes, or you can force LAMUM to read that Port@Host (issue lmstat command) now.
      1. Go to Admin/Data Collection Interval
      2. Click "**Run Cron**"

ix. Go back to the Usage/Home page. The status should be Green. If it is still red:
   1. Check License Server name. Is it correct? Does it need to be fully qualified?
   2. Check the Port #. Is it the lmstat port? If it is the "Admin" port it will not work. It must be the lmstat port.
   3. Is there a firewall or permission issue getting from the LAMUM server to the License Server?
   4. If you can't resolve it, contact TeamEDA (support@teameda.com)
   5. You must have a green status light on the Usage/Home page to proceed.

Viewing Current Checkouts

Assuming you have a green status on the Usage/Home page, now you should be able to see Current feature/tool checkouts for that Line Item.

a. Go to the Usage/Current Tab.
b. Click **Overview**. This will show you every feature/tool currently checked out, its Tag name (Port@Host), your Capacity, how many licenses are currently checked out, and color-coded % of Capacity. You can drill into details by clicking on the Feature name, then click on **Current Usage Details**
   i. "Current Usage Details" shows you a list of every User (engineer) who has a license currently checked out, User machine, and how long it has been checked out for. You can click twice on the Column heading "**Total Time in Use**" to see who has it checked out the longest. This can be quite revealing!
   ii. If Active Directory is set up and working, you can click on the **User name** and a window from AD will pop up with all their AD information. You can click on their email address, and directly go the Outlook to send them an email.
      1. Go back to the Usage/Current Tab and click "**Current Overview Gauge display**". Pretty cool! Shows every feature/tool checked out in a gas gauge format, which automatically updates every 15 minutes. You can drill in to see the User Details by clicking of the blue feature name. Keep this page open all the time if you want!
      2. You can be more selective on which features/tools you show as gas gauges:
         a. Go back to the **Current Overview** page.
         b. Use the boxes to the left to select the features you wish to show as gas gauges.
         c. At the bottom of the page, click "Select Gauge Display". Now you see only those features selected.
   iii. There is a white paper that discusses way of showing Current Checkouts: https://teameda.com/files/4315/2174/1533/Current_Checkouts_Reporting_with_LAMUM_032018.pdf

The direct-access portal

So far you have been working through the :8181 port (look at the URL), which gives you access to all the Inventory, Asset, Vendor, License Server, Renewal, Cost information, and Usage reports. It requires you to login with a User name and password. LAMUM offers direct access to Usage reports (Current Checkouts and Historical usage) without going through the login page but is restricted to only the Usage reports.

a. To access the :8182 portal, put your curser over the Usage/Home Tab. Right mouse click. Select **Open New Window**. You should now see a 2nd window with only 6 Tabs, all Usage related. Or you can type http://yourIP:8182/lammonitor into the URL.
b. Save this :8182 window as a Favorite. Calling it "Usage Monitor" in fine. Now you can get there by the Favorite. So, you should have a License Asset Manager Favorite (:8181) which will go to the login page. And you should have a Usage Monitor Favorite (:8182) which will take you to the 6-Tab Usage Reports page. You will need both!
c. **Important fact: any Report created in :8182 can be saved as a "Favorite", or as a hyperlink in a "User Dashboard". That URL will take you to a specific usage report, and is created "on demand", with the most current data.**
d. Exercise: create a Gas Gauge display for selected features, in the :8182 portal. Save that URL as a Favorite in your browser, with a User-friendly name. Now go somewhere else (back to the Usage/Home page). Find the Favorite you just saved and click on it. That is just the beginning. You can do that for any Usage report created with a :8182 URL.

Feature Name Aliasing

All usage reporting is by Feature/Tool name. Some Vendors are good with Feature/Tool names, using names that make sense. But some Vendors are horrible, using feature names that make no sense, are cryptic, where only an expert knows what they are. People that look at usage reports may not be expert, so you may need to create Feature names that are more User-friendly.

a. Go to Usage/Admin Tab
b. Select "**Change Feature Display Name**" (near bottom)
c. The list might be very long. Scan through the list and see if there are Vendor-given Feature Names (left column) that make no sense. Change them in the box to the right (Display Name). Click **Update** to save. This assumes you have feature-name mapping from the Vendor
d. You can search/filter by using the filter box at the top of the Table.
e. LAMUM uses the "Display Name" in its reports. The only exception is if you are looking at Realtime "License Information" (**Listing/Expiration dates**), which only shows the Vendor-given feature/tool name.

Homework

Set up Mail & Active Directory

1. Usage/Admin Tab
   a. Mail & Active Directory Setup
      i. Mail Server: complete the "settings". Click "**Update**" to save. Run "Email Test" to be sure it is working.
      ii. Active Directory: complete the "settings". Click "**Update**" to save. Use the AppNote "Active Directory Setup" if you need help. Test after you have "Current Checkout Details", then click on a User Name and see if you get their AD information.

Read the "Creating User Dashboards" white paper

https://teameda.com/files/5715/0973/2420/Creating_a_User_Dashboard_103017.pdf

For help or more information, contact:

TeamEDA
603-656-5200
support@teameda.com

Appendix A

Vendor	Type	Daemon	Typical lmstat Port	Port Alternative
Abaqus	Flex	abaquslm	7571	27011
Agilent	?	agileesofd	1702	
Altera	Flex	alterad		
Ansoft	Flex	ansoftd	27000	
Ansys	Flex	ansyslmd	1055	
ARM	Flex	armlmd		
Atrenta	Flex	atrenta		
AutoDesk	Flex	adsflex	27000	
Cadence	Flex	cdslmd	5280	
CATIA	DSLS		4085	
Cliosoft	Flex	cliolmd	39500	
COMSOL	Flex	lmcomsol	1718	
Doors	Flex	ibmratl	7178	1706
ESRI	Flex			
EXA	Flex	exa-lmd	27007	
Femap		esplmd	49213	
Geometric	Flex	gssl	25000	
Geomagic	Flex	geowatch	28000	
Interrad	Flex	interrad		
LabView	NI	nilm	11500	
Lattice	Flex	xvllm(?)	1200	
LSF/Platform	Flex	lsf_ld	1800	1700
LTX	Flex	ltxd	1706	
MathWorks	Flex	mlm	27000	1705
Mentor	Flex	mgcld	1800	1717
Methodics	Flex	mdxlmd		
Minitab	Flex	minitab	27005	27000
MSC	Flex	msclm	1707	27500
NX/Seimens	Flex	ugslmd	28000	
ORCAD	Flex	cdslmd	5280	
PTC	Flex	ptc_d	7788	5280
Sigmetrix	Flex	titollm	26000	
SIMetrix	?	pdt	27000	
SolidWorks	Flex	sw_d	25734	
Synopsys	Flex	snpslmd	27000	
Xilinx	Flex	xilinxd	27105	2100
Xtensa	Flex	xtensad		
Delmia	Flex	debeb	1700	
Non-Flex				
Accurev	Reprise	*accurev*		
Altium	Altium	*altium*	na	
Adina	Sentinel	*sentinel*	na	
Altair	LM-X	*altair*	6200	
Mathematica	MathLM			
Vericut	Sentinel			