

UNITY PORTAL – LICENCE ALLOCATION

This document outlines the steps involved in allocating licences to resellers and groups, as requested by Simple Signal. For these purposes a temporary portal user account is being used at the Simple Signal level, therefore “I”, “we” or “you” should be interpreted as “any login at the Simple Signal level”.

Licences are purchased by Simple Signal in blocks, and the total sum of licence purchases in one or more blocks is referred to as the licence pool. This is basically a running count of purchased and assigned licences of any one type (Desktop Pro, Desktop Enterprise, Call Center Agent Standard etc). The system ensures that the number of licences assigned to users is never more than the number of purchased licences in the licence pool.

Licences can be assigned directly to end users or can be allocated to individual resellers and groups. When a licence is assigned to an end user it is removed from the system provider licence pool, meaning that the licence cannot be assigned to another user until it is first unassigned. In reality individual licences are not managed separately; rather the count of assigned licences is incremented as the number is assigned and decremented when the licence is unassigned (or the user account is deleted).

When one or more licences are allocated to a reseller or group [through a sub-purchase], the system provider licence pool is not affected, because sub-purchases are only used to impose a limit to the number of licences that can then be assigned to end users within that reseller and/or group. This means that a system provider can allocate more licences than they have actually purchased.

Therefore, a licence can be “allocated” or “assigned”. Allocation means entering a sub-purchase at the reseller or group level. This doesn’t impact the availability of licences in the provider licence pool, although it can impact the availability of licences at the reseller level, if the “Unallocated & Unassigned” licence oversell permission is set, as outlined in detail below.

Licence assignment is when the licence is assigned to an end user. This will always impact the number of available licences in the provider licence pool, as well as the reseller and/or group licence pools (if applicable).

There is a new column in the Licence Details tab at the system provider and reseller level, called “Allocated”. This column displays the number of licences [for each licence type] that have been allocated [through sub-purchases] to the level directly below. For example when viewing the licence details at the system provider level this will only show the total licence allocated to resellers, as shown below. When viewing at the reseller level it shows only those licences allocation to groups.

Details Automatic Assignment Branding Server Hostnames Portal User Accounts License Details Resellers History Log

Simple Signal Licenses

Unity licenses currently assigned to the users of this system provider.

Download License Usage Breakdown	License Type	Purchased	Allocated	Assigned
Purchases Allocations Assignments	UnityDesktop Lite	0	0	0
Purchases Allocations Assignments	UnityDesktop Pro	200	30	157
Purchases Allocations Assignments	UnityThirdPartyConnector Standard	0	0	0
Purchases Allocations Assignments	UnityDesktop Trial	0	0	13
Purchases Allocations Assignments	UnityThirdPartyConnector Trial	0	0	0
Purchases Allocations Assignments	UnityDesktop Enterprise	100	30	100
Purchases Allocations Assignments	UnityAgent Trial	0	0	0
Purchases Allocations Assignments	UnityAgent Standard	0	0	0
Purchases Allocations Assignments	UnityReception Beta	0	0	0
Purchases Allocations Assignments	UnityAgent Enterprise	0	0	0
Purchases Allocations Assignments	UnitySupervisor Trial	0	0	1
Purchases Allocations Assignments	UnitySupervisor Standard	0	0	0
Purchases Allocations Assignments	UnitySupervisor Enterprise	0	0	0
Purchases Allocations Assignments	UnityWallboard Trial	0	0	0
Purchases Allocations Assignments	UnityWallboard Standard	0	0	0

New "Allocated" column

You can click on the Allocation button to see a list of the child companies that have licences allocated to them, but to add a sub-purchase to a child company you must navigate to that company. For example, let's say I want to allocate 30 Unity Desktop Pro licences to the "SimpleSignalInc" reseller. To do this I browse to the reseller and click on the Licence Details tab, as shown below.

Details Automatic Assignment Branding Portal User Accounts License Details Groups History Log

SimpleSignalInc Licenses

Unity licenses currently assigned to the users of this reseller.

	License Type	Purchased	Allocated	Assigned
Purchases Allocations Assignments	UnityDesktop Lite	0	0	0
Purchases Allocations Assignments	UnityDesktop Pro	0	1	1
Purchases Allocations Assignments	UnityThirdPartyConnector Standard	0	0	0
Purchases Allocations Assignments	UnityDesktop Trial	0	0	0
Purchases Allocations Assignments	UnityThirdPartyConnector Trial	0	0	0
Purchases Allocations Assignments	UnityDesktop Enterprise	0	8	15
Purchases Allocations Assignments	UnityAgent Trial	0	0	0
Purchases Allocations Assignments	UnityAgent Standard	0	0	0
Purchases Allocations Assignments	UnityReception Beta	0	0	0
Purchases Allocations Assignments	UnityAgent Enterprise	0	0	0
Purchases Allocations Assignments	UnitySupervisor Trial	0	0	1
Purchases Allocations Assignments	UnitySupervisor Standard	0	0	0
Purchases Allocations Assignments	UnitySupervisor Enterprise	0	0	0
Purchases Allocations Assignments	UnityWallboard Trial	0	0	0
Purchases Allocations Assignments	UnityWallboard Standard	0	0	0

From here I click on the purchases button for the licence I want to allocate.

Details Automatic Assignment Branding Portal User Accounts License Details Groups History Log

UnityDesktop Pro Purchase Details

Order Date	Ordered By	Reference	Licenses Purchased
Cancel Add Sub-Purchase			

Where I can see that there are no purchases for this reseller. Now click the "Add sub-purchase" button to add the sub-purchase to the reseller.

Details Automatic Assignment Branding Portal User Accounts License Details Groups History Log

New License Purchase

This will be entered as a sub purchase and will not actually increase the number of licenses available in the above license pool. Rather, sub purchases are used to limit the number of licenses that can be manually or automatically assigned to users within this reseller.

Purchase Order Ref

Licenses To Purchase

I then enter the PO for the order (if applicable) and the number of licences to allocate. As mentioned above, a system provider can always allocate more licences that they have actually purchased, although this may not be the case for resellers (as described below).

Once I click “Add Purchase“ the 30 Unity Pro licence are allocated to the reseller, as we can see in the Licence Details list for this reseller.

Details Automatic Assignment Branding Portal User Accounts License Details Groups History Log

SimpleSignalInc Licenses

Unity licenses currently assigned to the users of this reseller.

	License Type	Purchased	Allocated	Assigned
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityDesktop Lite	0	0	0
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityDesktop Pro	30	1	1
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityThirdPartyConnector Standard	0	0	0
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityDesktop Trial	0	0	0
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityThirdPartyConnector Trial	0	0	0
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityDesktop Enterprise	0	8	15
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityAgent Trial	0	0	0
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityAgent Standard	0	0	0
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityReception Beta	0	0	0
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityAgent Enterprise	0	0	0
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnitySupervisor Trial	0	0	1
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnitySupervisor Standard	0	0	0
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnitySupervisor Enterprise	0	0	0
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityWallboard Trial	0	0	0
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityWallboard Standard	0	0	0

Annotations: 30 licences have been purchased (pointing to the 30 in the Purchased column for UnityDesktop Pro); 8 licences have been allocated (pointing to the 8 in the Allocated column for UnityDesktop Enterprise).

You can also see from the above screenshot that this reseller has allocated 8 Desktop Enterprise licences but has not purchased any (if a reseller has allocated more than they have purchased the figure is displayed in red). This is possible because of the Licence Oversell Permission assigned to this reseller.

If we click on the Automatic Assignment tab for this reseller we can see that the Licence Oversell Permission is set to “No Limit”

Details Automatic Assignment Branding Portal User Accounts License Details Groups History Log

SimpleSignalInc Automatic Purchase Details Automatic Assignment.

The system provider can specify the message to be displayed once the trial license expires and no other license is set to be automatically assigned. This message will only be used if the reseller or provider have purchased licenses. If no message is entered or licenses have not been purchased the provider expiry message will be used.

Once a license is configured for automatically assignment, this will become the default setting for all groups within the reseller.

The License Oversell Permission is very important as it dictates how resellers can manage licenses. Please click [here](#) for help.

License Expiry Prompt

Purchase Page URL

License Oversell Permission

UnityAgent

UnityDesktop

UnityReception

UnitySupervisor

UnityThirdPartyConnector

UnityWallboard

Annotation: New Licence Oversell Permission settings (pointing to the License Oversell Permission dropdown).

There are four permissions available.

NO LIMIT

The reseller is free to assign licences to end-users or allocate licences to groups without limit. The reseller does not need to purchase licences in order to assign or allocate them. This permission would be used if the reseller is a company that the system provider uses to sell direct, or if the reseller is charged for licences as they are assigned to end users (for example through a provisioning/billing system) in which case a limitation may not be required. This is the most flexible of the licence oversell options as **a reseller is free to sell [through allocation to groups and assignments to users] as many licences as they like**, the only limit is the number of available licences in the system provider licence pool.

UNALLOCATED LICENCES *WITH* FORCED GROUP ALLOCATION

Only licences that have been allocated to the reseller can be assigned to end-users or allocated to groups, and that **a licence cannot be assigned to a user unless it is first allocated to the group**. This provides the most control as sub-purchases must be allocated at all levels, but requires the most administrative overhead and doesn't allow the reseller to oversell licences at all.

UNALLOCATED LICENCES *WITHOUT* FORCED GROUP ALLOCATION

Only licences that have been allocated to the reseller can be assigned to end-users or allocated to groups. **Licences may be allocated to groups**, in which case this is used to limit licence assignments within that group (for example if a group has 5 licences allocated then only 5 licences can be assigned to users within that group) **but this is not forced**. If licences are not allocated to a group then the only limit to the number of licences that can be assigned to users within that group is the number of licences allocated to the reseller and available in the system provider licence pool. This allows the reseller some scope for overselling licences, because allocated licences are still available in the reseller licence pool.

UNALLOCATED & UNASSIGNED LICENCES

Only those licences that have been allocated to the reseller and are currently unassigned and unallocated can be assigned to end users or allocated to groups. In other words, **when licences are allocated to a group they are not available for allocation or assignment elsewhere**. This is a hybrid between the Unallocated Licences with Forced Group Allocation and Unallocated Licences without Forced Group Allocation permissions, because licences may be assigned to groups, but this is not forced. Either way the system provider licence pool cannot be depleted [as they can with the Unallocated Licences without Forced Group Allocation permission] because the reseller cannot allocate or assign more licences than they have in their own licence pool.

This setting is also at the system provider level, but is only used to automatically set the licence oversell permission of any new resellers created. This is shown below.

Details | Automatic Assignment | Branding | Server Hostnames | Portal User Accounts | License Details | Resellers | History Log

Simple Signal Automatic Purchase Details

The system provider can specify the message to be displayed once the trial license expires, assuming that a license is not configured for automatic assignment. A URL can also be displayed to the user which will direct them to a web page where Unity licenses can be purchased. This will only be used if the provider has purchased licenses. If no message is entered or license have not been purchased the Kakapo Systems expiry message will be used.

Instead of displaying the expiry message, the system can automatically assign a license for a specific application. This will override any automatic assignments configured at the reseller or group level within this provider.

The Reseller License Oversell Permission is used to set the license oversell permission of all new resellers. This does not affect existing resellers, nor does it apply to the system provider who can oversell licenses without limit.

License Expiry Prompt: Your trial license has expired. Please contact Simple Signal to arrange license purchase.

Purchase Page URL: [Empty field]

Reseller License Oversell Permission: [Dropdown menu with options: No Limit, No Limit, Unallocated Licenses With Forced Group Allocation, Unallocated Licenses Without Forced Group Allocation, Unallocated & Unassigned Licenses]

UnityAgent: [No Automatic Assignment]

UnityDesktop: [No Automatic Assignment]

UnityReception: [No Automatic Assignment]

UnitySupervisor: [No Automatic Assignment]

UnityThirdPartyConnector: [No Automatic Assignment]

UnityWallboard: [No Automatic Assignment]

[Update]

This setting will only apply to new resellers, existing reseller oversell permissions must be changed individually.

Please be aware that when changing the licence oversell permission for an existing reseller, purchases may first have to be added to the reseller licence pool, and possibly also to the group licence pool before the permission can be set.

For example, the system will not allow the permission to be changed from “No Limit” to “Unallocated & Unassigned Licences Only” if the reseller currently has more licences assigned to end users and allocated to groups than they have purchased. This is illustrated when I try to change the permission for the SimpleSignalInc reseller. We have already seen in the Licence Details list for this reseller (above) that they have allocated 8 licences and assigned 15 Unity Enterprise licences, but have not purchased any from the system provider. This is allowed because this reseller has the “No Limit” permission set. However, when we try to change the licence oversell permission we see the below message.

Details | Automatic Assignment | Branding | Portal User Accounts | License Details | Groups | History Log

SimpleSignalInc Automatic Purchase Details Automatic Assignment.

The system provider can specify the message to be displayed once the trial license expires and no other license is set to be automatically assigned. This message will only be used if the reseller or provider have purchased licenses. If no message is entered or licenses have not been purchased the provider expiry message will be used.

Once a license is configured for automatic assignment, this will become the default setting for all groups within the reseller.

The License Oversell Permission is very important as it dictates how resellers can manage licenses. Please click [here](#) for help.

The oversell permission cannot be set to 'Unallocated & Unassigned Licenses' because there are 7 UnityDesktop Enterprise licenses assigned to users but the reseller has purchased 0. Additional licenses must be purchased by the reseller in order to use this oversell permission.

License Expiry Prompt: [Empty field]

Purchase Page URL: [Empty field]

License Oversell Permission: [Dropdown menu with option: Unallocated & Unassigned Licenses]

UnityAgent: [No Automatic Assignment]

UnityDesktop: [No Automatic Assignment]

UnityReception: [No Automatic Assignment]

UnitySupervisor: [No Automatic Assignment]

UnityThirdPartyConnector: [No Automatic Assignment]

UnityWallboard: [No Automatic Assignment]

[Update]

Trying to change licence oversell permission

In order to change the licence oversell permission to Unallocated and Unassigned Licences for this reseller, at least 23 licences must be allocated to the reseller, which will cover the number of licences allocated to groups and assigned to users. These steps have already been outlined above.

Details Automatic Assignment Branding Portal User Accounts License Details Groups History Log

SimpleSignalInc Licenses

Unity licenses currently assigned to the users of this reseller.

License Type	Purchased	Allocated	Assigned
UnityDesktop Lite	0	0	0
UnityDesktop Pro	30	1	1
UnityThirdPartyConnector Standard	0	0	0
UnityDesktop Trial	0	0	0
UnityThirdPartyConnector Trial	0	0	0
UnityDesktop Enterprise	30	8	15
UnityAgent Trial	0	0	0
UnityAgent Standard	0	0	0
UnityReception Beta	0	0	0
UnityAgent Enterprise	0	0	0
UnitySupervisor Trial	0	0	1
UnitySupervisor Standard	0	0	0
UnitySupervisor Enterprise	0	0	0
UnityWallboard Trial	0	0	0
UnityWallboard Standard	0	0	0

30 licences now allocated

The above screen shot shows that 30 Desktop Enterprise licences have been allocated to the reseller. The licence oversell permission can now be changed.

Details Automatic Assignment Branding Portal User Accounts License Details Groups History Log

SimpleSignalInc Automatic Purchase Details Automatic Assignment.

The system provider can specify the message to be displayed once the trial license expires and no other license is set to be automatically assigned. This message will only be used if the reseller or provider have purchased licenses. If no message is entered or licenses have not been purchased the provider expiry message will be used.

Once a license is configured for automatically assignment, this will become the default setting for all groups within the reseller.

The License Oversell Permission is very important as it dictates how resellers can manage licenses. Please click [here](#) for help.

Details saved.

License Expiry Prompt

Purchase Page URL

License Oversell Permission: Unallocated & Unassigned Licenses

UnityAgent: No Automatic Assignment

UnityDesktop: No Automatic Assignment

UnityReception: No Automatic Assignment

UnitySupervisor: No Automatic Assignment

UnityThirdPartyConnector: No Automatic Assignment

UnityWallboard: No Automatic Assignment

Update

License oversell permission now changed

Please note that the licence oversell permission can always be changed to “No Limit”.

Now that the licence oversell permission is set to “Unallocated & Unassigned Licences” the system will not allow a situation to arise whereby the total number of licences assigned to users and allocated to groups is more than the number of licences that they have purchased from the system provider.

It is also worth noting that when using the Unallocated & Unassigned Licences permission the reseller licence details list is changed slightly, to show licences that are assigned to a user without first being allocated to the group, as shown below. This gives a better representation of licence allocations and assignments, because a licence that is allocated and then assigned should only be counted once.

Details Automatic Assignment Branding Portal User Accounts License Details Groups History Log

SimpleSignalInc Licenses

Unity licenses currently assigned to the users of this reseller.

			License Type	Purchased	Allocated	Assigned Without Allocation
Purchases	Allocations	Assignments	UnityDesktop Lite	0	0	0
Purchases	Allocations	Assignments	UnityDesktop Pro	30	1	1
Purchases	Allocations	Assignments	UnityThirdPartyConnector Standard	0	0	0
Purchases	Allocations	Assignments	UnityDesktop Trial	0	0	0
Purchases	Allocations	Assignments	UnityThirdPartyConnector Trial	0	0	0
Purchases	Allocations	Assignments	UnityDesktop Enterprise	30	8	7
Purchases	Allocations	Assignments	UnityAgent Trial	0	0	0
Purchases	Allocations	Assignments	UnityAgent Standard	0	0	0
Purchases	Allocations	Assignments	UnityReception Beta	0	0	0
Purchases	Allocations	Assignments	UnityAgent Enterprise	0	0	0
Purchases	Allocations	Assignments	UnitySupervisor Trial	0	0	0
Purchases	Allocations	Assignments	UnitySupervisor Standard	0	0	0
Purchases	Allocations	Assignments	UnitySupervisor Enterprise	0	0	0
Purchases	Allocations	Assignments	UnityWallboard Trial	0	0	0
Purchases	Allocations	Assignments	UnityWallboard Standard	0	0	0

Different column in licence details

When the No Limit permission is *not* set, a reseller and group login can be created in the Unity partner portal (which would be branded accordingly) that allows a reseller or group administrator to manage their own Unity licences. In this case we suggest the Licence Expiry Prompt is set at the reseller level so that when a trial licence expires, the user will be prompted to call the reseller rather than the system provider. This is illustrated below.

Details Automatic Assignment Branding Portal User Accounts License Details Groups History Log

SimpleSignalInc Automatic Purchase Details Automatic Assignment.

The system provider can specify the message to be displayed once the trial license expires and no other license is set to be automatically assigned. This message will only be used if the reseller or provider have purchased licenses. If no message is entered or licenses have not been purchased the provider expiry message will be used.

Once a license is configured for automatically assignment, this will become the default setting for all groups within the reseller.

The License Oversell Permission is very important as it dictates how resellers can manage licenses. Please click [here](#) for help.

Details saved.

License Expiry Prompt: Your trial license has expired. If you would like to continue using this product please call Simple Signal Inc on 610542258 or email sales@simplesignalinc.com

Purchase Page URL:

License Oversell Permission: Unallocated & Unassigned Licenses

UnityAgent: No Automatic Assignment

UnityDesktop: No Automatic Assignment

UnityReception: No Automatic Assignment

UnitySupervisor: No Automatic Assignment

UnityThirdPartyConnector: No Automatic Assignment

UnityWallboard: No Automatic Assignment

Update

Reseller licence expiry

Reseller and group logins can always be created in the portal, however we do not recommend this if the reseller licence oversell permission is set to No Limit.

When assigning licences to an end user the following logic is used

