

Reconciliation of Licenses In the PPM Tool

USER GUIDE

Office of Management &
Enterprise Services

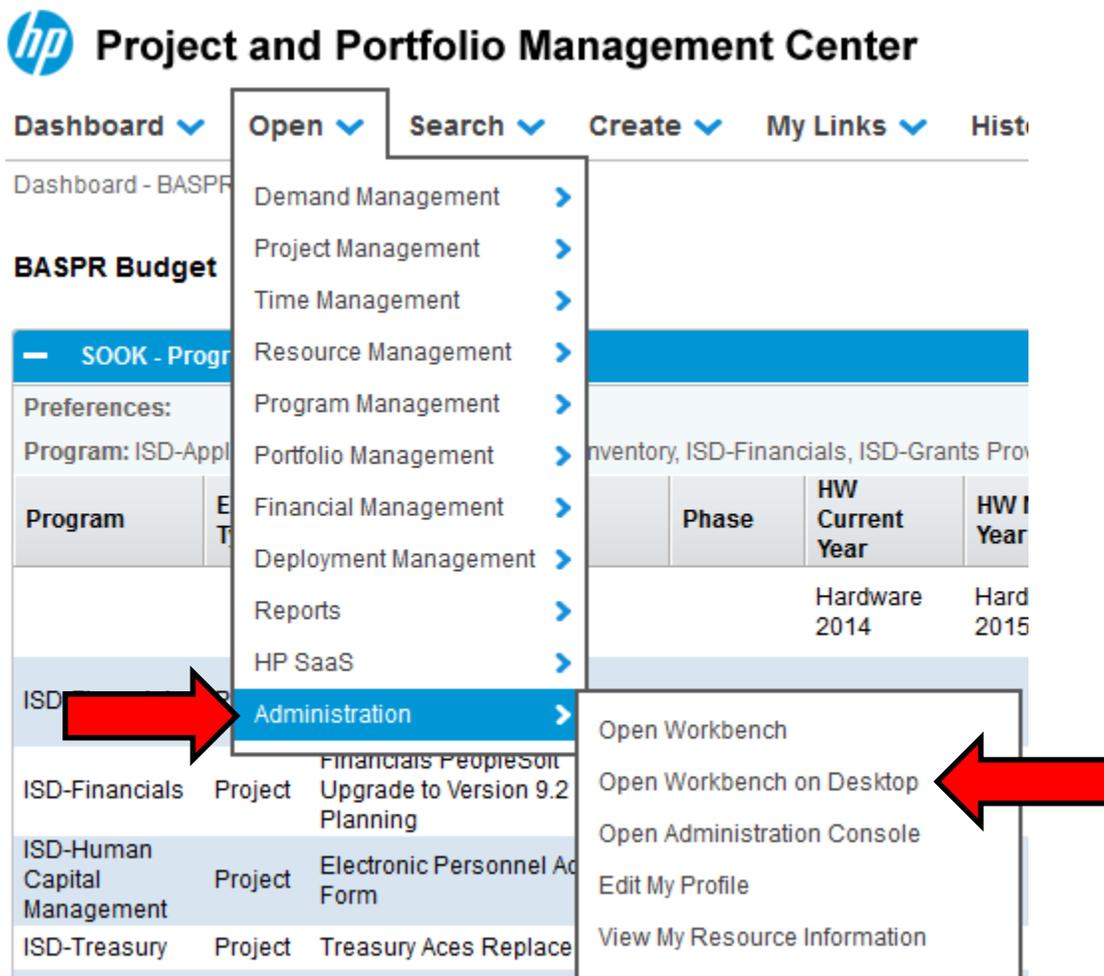
Information Services



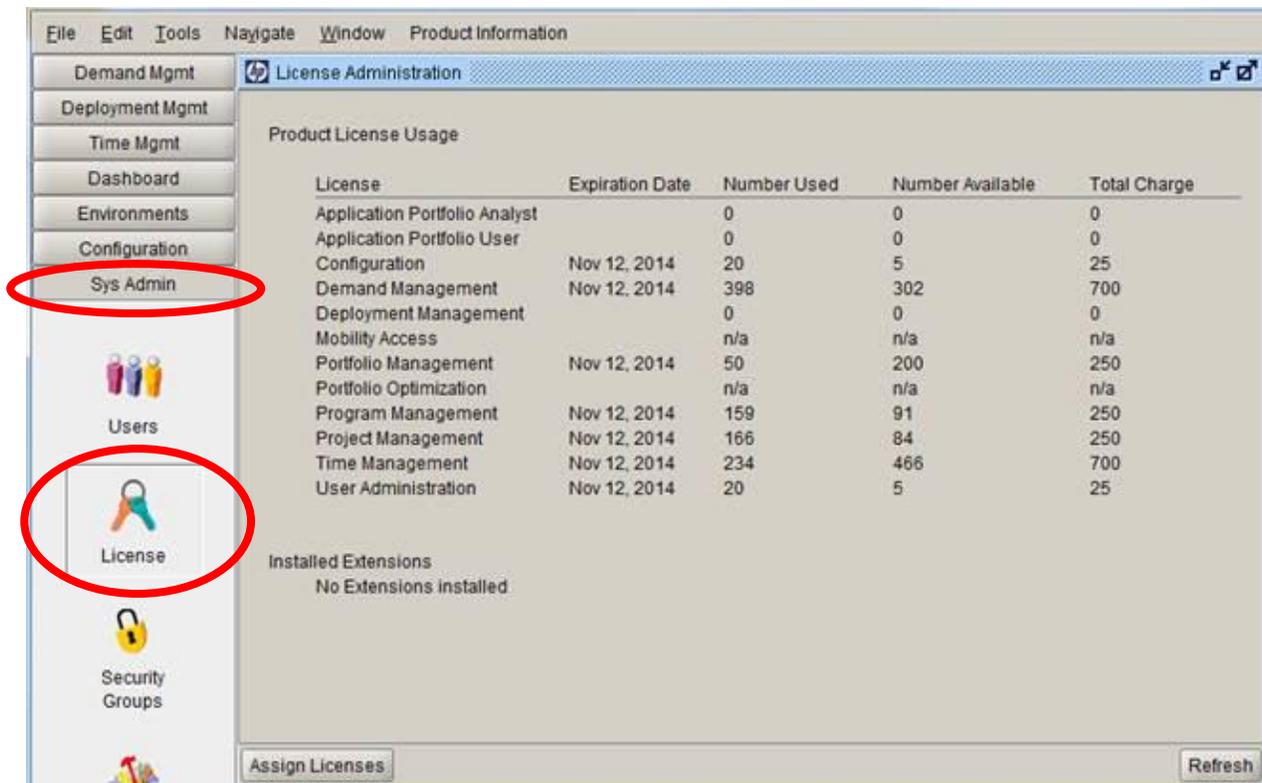
The purpose of this user guide is to make sure all agencies are utilizing the licenses they have purchased. You will need to reconcile the number of View and Full licenses listed on the Workbench to the number of licenses listed on the PPM Tool. Then you will compare the number of licenses being used to the number of licenses being paid for by each agency.

Reconciliation of the Workbench and the PPM Tool

1. Login to the PPM tool's Workbench. Go to **Open < Administration < Open Workbench on Desktop**. The credentials are the same as logging in to the PPM tool.

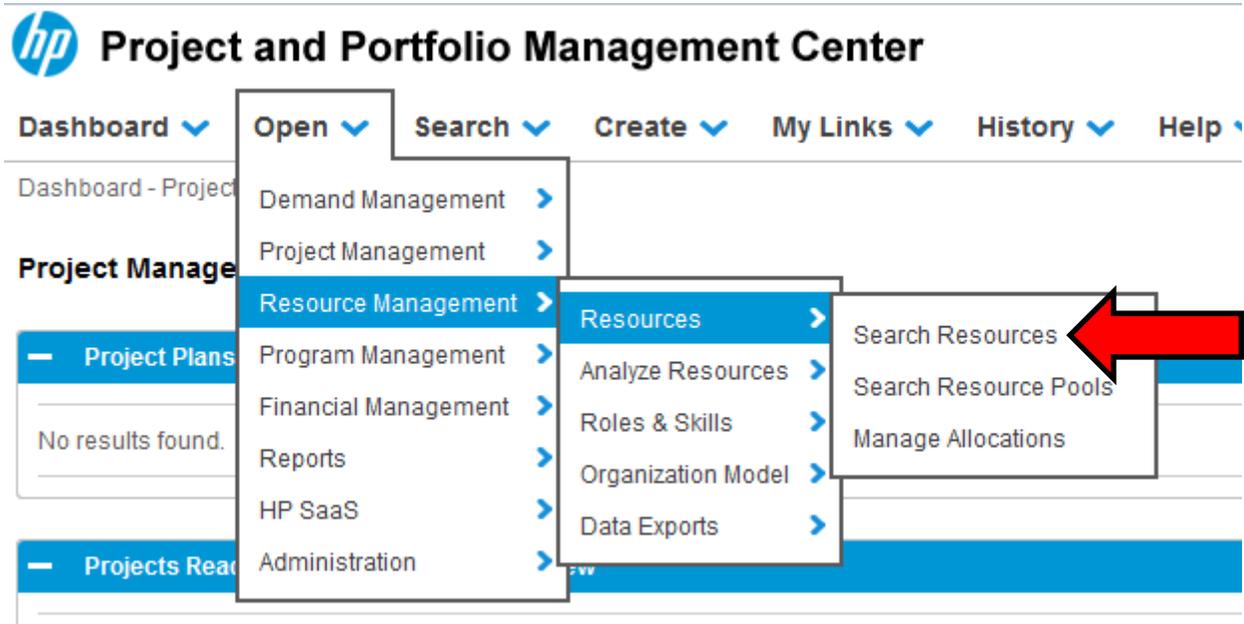


2. Click the **Sys Admin** button on the upper left-hand side of the screen. Then click the **License** button below Sys Admin to access the License Administration window.

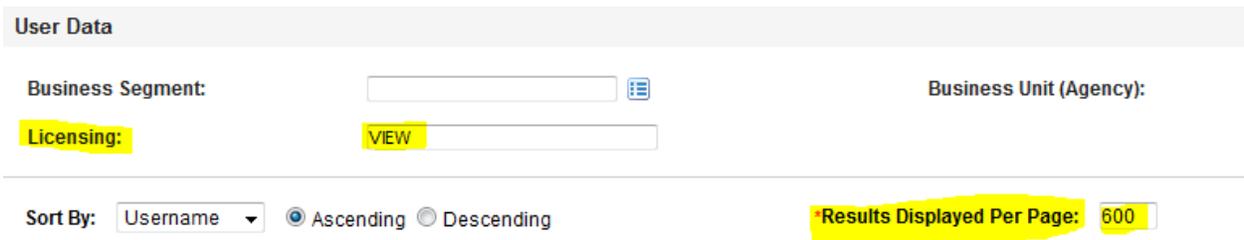


3. Record the **Number Used** of Time Management licenses. This number will later be compared to the number of VIEW licenses listed in the PPM tool.
4. Now record the **Number Used** of Project Management licenses. This number will later be compared to the number of FULL licenses in the PPM tool.

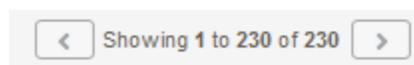
5. Return to the PPM tool and go to **Open < Resource Management < Resources < Search Resources**.



6. In the User Data section, type **VIEW** in the **Licensing** text box. Next, change the **Results Displayed Per Page** to **600**. Then click **Search**.



7. The number of records returned will show before and after the search results on the right-hand side.



The number of results found (230 in this example) should be one less than the “Number Used” of Time Management licenses found earlier in the Workbench.

Note: The difference is due to **Results Positive** showing up on the Workbench. Results Positive is the name of PMO’s outside administrator. They will show up on the Workbench searches for VIEW and FULL licenses, but not on the PPM tool’s searches. This means that when you run a search on Workbench, both for Time Management and Project Management, the “Number Used” should be one greater than the results from the PPM tool.

8. If the difference between the Workbench results and PPM tool results is different than one, you will need to reconcile them. Continue to the following steps to attain the FULL license results first.
9. Return to **Search Resources** (Open < Resource Management < Resources < Search Resources).
10. In the User Data section, type **FULL** in the **Licensing** text box. Change the **Results Displayer Per Page** to **600**. Then click Search.

User Data

Business Segment: 

Business Unit (Agency):

Licensing: **FULL**

Sort By: Ascending Descending

Results Displayed Per Page:

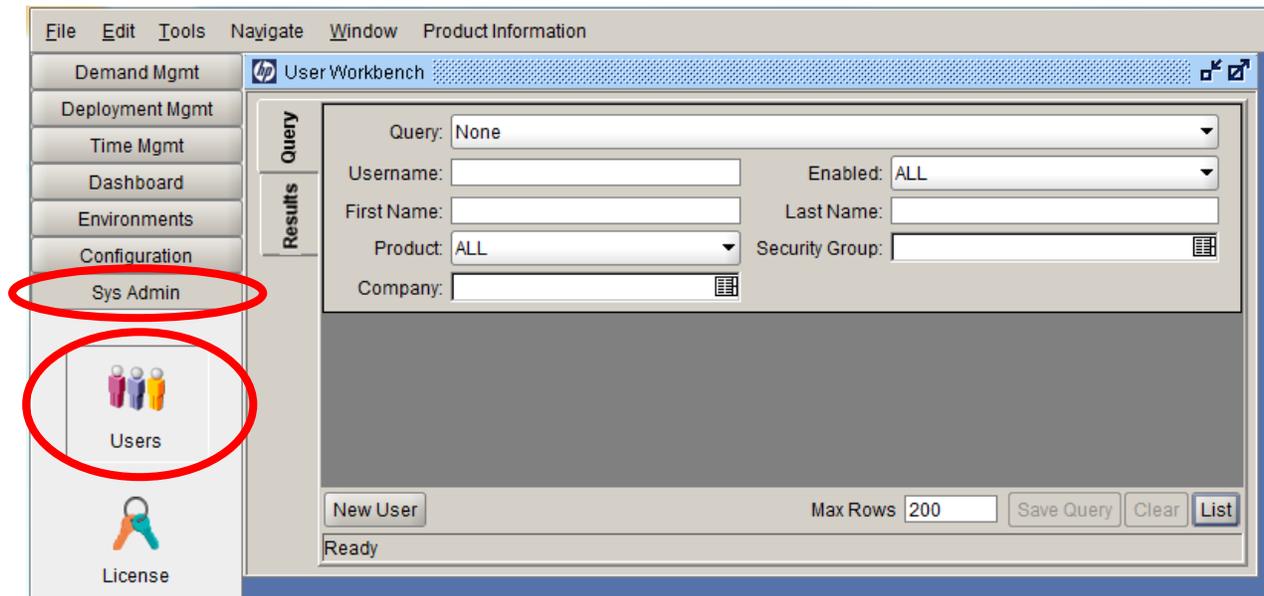
11. Make sure the number of results found (163 in this example) is one less than the “Number Used” of Project Management licenses found earlier in the Workbench.



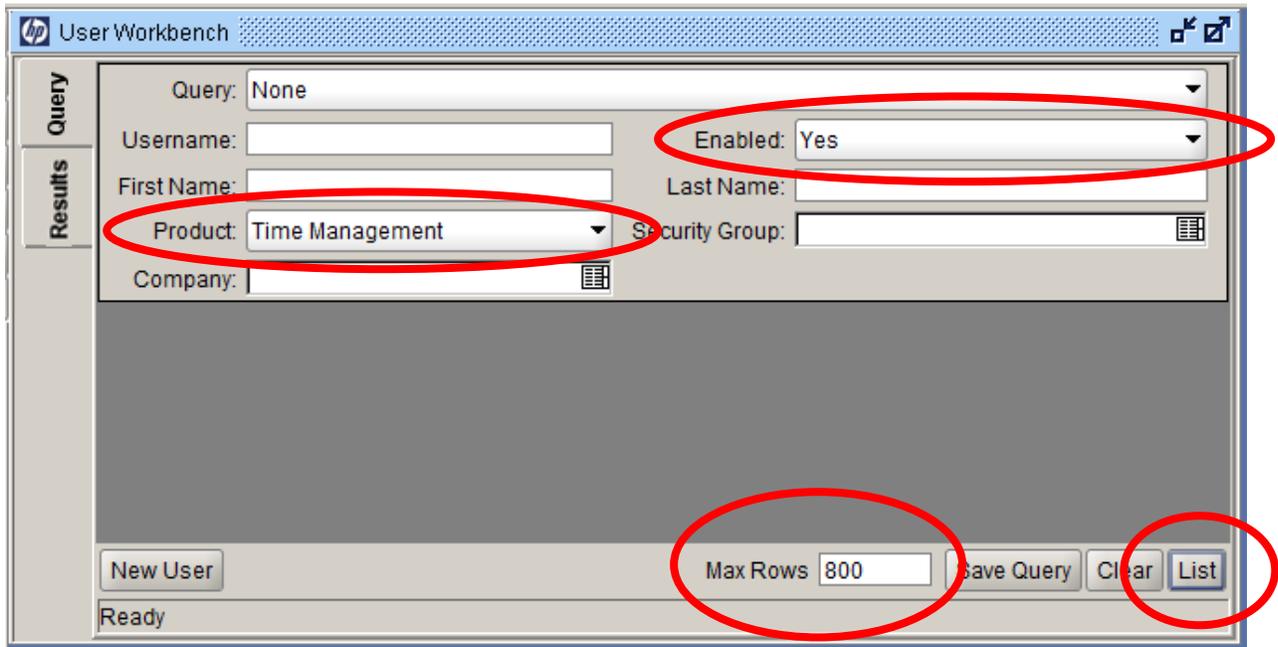
12. If either the numbers for either the VIEW or FULL license from the PPM tool is not one less than the results from the Workbench, continue to the next section, “When the Results do not Match”.

When the Results Do Not Match

1. If the number of either Time Management licenses or Project Management licenses from the PPM tool is not one less than the number from the Workbench, you will need to return to the Workbench.
2. Click the **Sys Admin** button on the upper left-hand side of the screen. Then click the **Users** button below Sys Admin to access the User Workbench window.



- From the “Product” dropdown menu, select either **Time Management** or **Project Management** (the number of licenses that did not match) and ensure that the “Enabled” dropdown menu says **Yes**. Change the **Max Rows** to accommodate at least the number of licenses previously shown. Then click the **List** button.

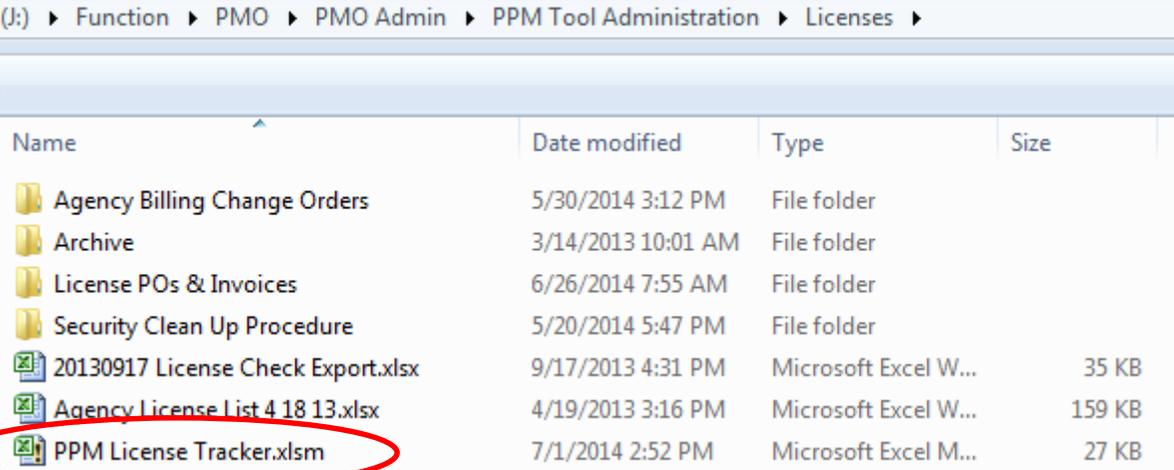


- Take the list of search results and compare it to the list from the PPM tool to locate any discrepancies. The names on each list should match the names on the other list, with the exception of **Results Positive** on the Workbench list.
- When you find a name on one list, but not on the other, compare the user’s Licensing status on the PPM tool to their Application Licenses on the Workbench. Reconcile the two places so that the user’s license is the same in both places. Continue doing this for each discrepancy until the PPM tool results for both VIEW and FULL licenses are one less than the Workbench results.

Reconciling the Licenses Paid to the Licenses Used

After reconciling the number of View and Full licenses listed on the Workbench to the number of licenses listed on the PPM Tool, you will need to make sure the number of View and Full licenses each agency is using is less than or equal to the number of licenses they have purchased.

1. Open the PPM License Tracker spreadsheet located at the following location:
J:Drive < Function < PMO < PMO Admin < PPM Tool Administration < Licenses

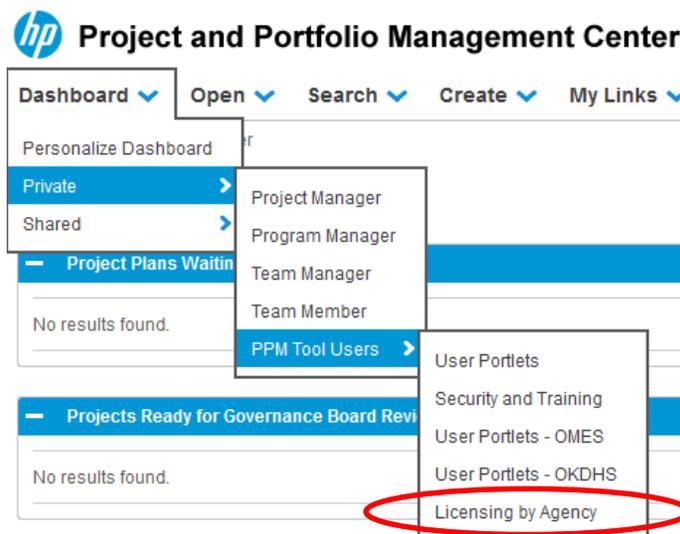


Name	Date modified	Type	Size
Agency Billing Change Orders	5/30/2014 3:12 PM	File folder	
Archive	3/14/2013 10:01 AM	File folder	
License POs & Invoices	6/26/2014 7:55 AM	File folder	
Security Clean Up Procedure	5/20/2014 5:47 PM	File folder	
20130917 License Check Export.xlsx	9/17/2013 4:31 PM	Microsoft Excel W...	35 KB
Agency License List 4 18 13.xlsx	4/19/2013 3:16 PM	Microsoft Excel W...	159 KB
PPM License Tracker.xlsm	7/1/2014 2:52 PM	Microsoft Excel M...	27 KB

- When the License Tracker opens, click the **License List** tab at the bottom of the screen. This will bring up the list of Advanced User (FULL) Licenses and Occasional User (VIEW) Licenses for each agency and the agency's Point of Contact. This point of contact will be the person to contact if any of the agencies are using more licenses than they have purchased.

<i>Agency</i>	<i>Point of Contact</i>	<i>Advanced User License</i>	<i>Occasional User License</i>
Agriculture	Leea Mote	3	12
Career Tech	Richard Batchler	1	4
Corporation Commission	Jackie Huff	3	15
Corrections	Joe Harlin	1	4
DAC	Bob Eubank	2	8
DEQ	Leea Mote	1	11
Education	Leea Mote	10	40
Health	Keith Lindsay	4	40
Juvenile Affairs	Len Morris	1	4
Libraries	Leea Mote	2	8
Mental Health	Mark Black	7	28
ODOT - OMES	Randy Jones	19	76
ODOT-Construction	Ray Sanders	22	88
OESC	Mike Evans	1	4
OHCA	Lynn Puckett	4	16
OKDHS	Lynn Moore	38	152
OSBI	Jo Miller	4	16
Public Safety	James Bassett	7	28
Rehab Services	Jonathan Woodward	5	20
Tax	Art Hanlin	7	28
Tourism	Leea Mote	1	4
Veterans	Kris Vietch	3	17
Water Resources	Leea Mote	1	4

- In the PPM Tool, go to **Dashboard < Private < PPM Tool Users < Licensing by Agency**.



- A listing of agencies with the PPM Tool users for each agency will appear. Choose an agency, such as ODAFF, and click the **Export to Excel** link in the bottom of the agency's portlet. This will allow you to view all of the agency's users.

ODAFF

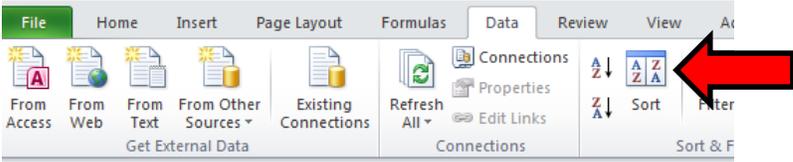
Preferences:

First Name: ; Last Name: ; Security Group: Agriculture, Food & Forestry

Name	Username	First Name	Last Name	Email	Department: Username (contains):	Business Segment	Category	Cost Category	Company	Licensing
Jamie Allen	130467	Jamie	Allen	jamie.allen@ag.ok.gov	Agriculture, Food & Forestry:Administration	Natural Resources	Full Time Employee	Internal Labor	State of Oklahoma	NONE-ODAFF
Ellie Ball	108656	Ellie	Ball	ellie.ball@omes.ok.gov	OMES:Information Services	Natural Resources	Full Time Employee	Internal Labor	State of Oklahoma	FULL-ODAFF
Sancho Dickinson	125106	Sancho	Dickinson	sancho.dickinson@ag.ok.gov	Agriculture, Food & Forestry:Administration	Natural Resources	Full Time Employee	Internal Labor	State of Oklahoma	NONE-ODAFF
Julie Fitzgerald	139630	Julie	Fitzgerald	julie.fitzgerald@ag.ok.gov	Agriculture, Food & Forestry:Administration	Natural Resources	Full Time Employee	Internal Labor	State of Oklahoma	NONE-ODAFF
George Geissler	118588	George	Geissler	george.geissler@ag.ok.gov	Agriculture, Food & Forestry:Administration	Natural Resources	Full Time Employee	Internal Labor	State of Oklahoma	NONE-ODAFF

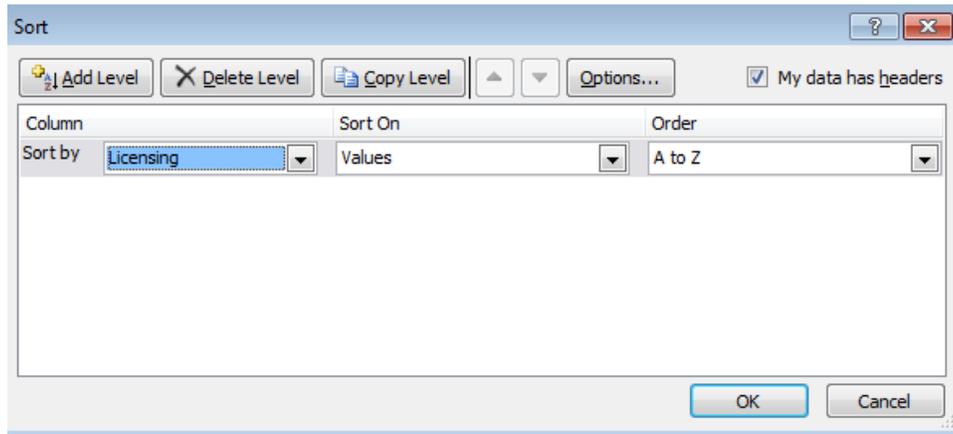
 [Export to Excel](#) Showing 1 to 5 of 14

- When the Excel spreadsheet opens, highlight only the rows containing the users' information. Click the **Data** tab and then click the **Sort** button.



Name	Username	First Name	Last Name	Email
Jamie Allen	130467	Jamie	Allen	jamie.allen@ag.ok.gov
Ellie Ball	108656	Ellie	Ball	ellie.ball@omes.ok.gov
Sancho Dickinson	125106	Sancho	Dickinson	sancho.dickinson@ag.ok.gov
Julie Fitzgerald	139630	Julie	Fitzgerald	julie.fitzgerald@ag.ok.gov
George Geissler	118588	George	Geissler	george.geissler@ag.ok.gov
Mike Grimes	103033	Mike	Grimes	mike.grimes@ag.ok.gov
Teena Gunter	131146	Teena	Gunter	teena.gunter@ag.ok.gov
Judy Jackson	150674	Judy	Jackson	Judy.Jackson@omes.ok.gov
Dan Parrish	120458	Dan	Parrish	dan.parrish@ag.ok.gov
Larry Rudebusch	125694	Larry	Rudebusch	larry.rudebusch@ag.ok.gov
Joseph Steen	285926	Joseph	Steen	joseph.steen@omes.ok.gov
Stan Stromberg	133678	Stan	Stromberg	stan.stromberg@ag.ok.gov
Bill Taylor	128597	Bill	Taylor	bill.taylor@ag.ok.gov
Mike Vandeventer	131795	Mike	Vandeventer	mike.vandeventer@ag.ok.gov

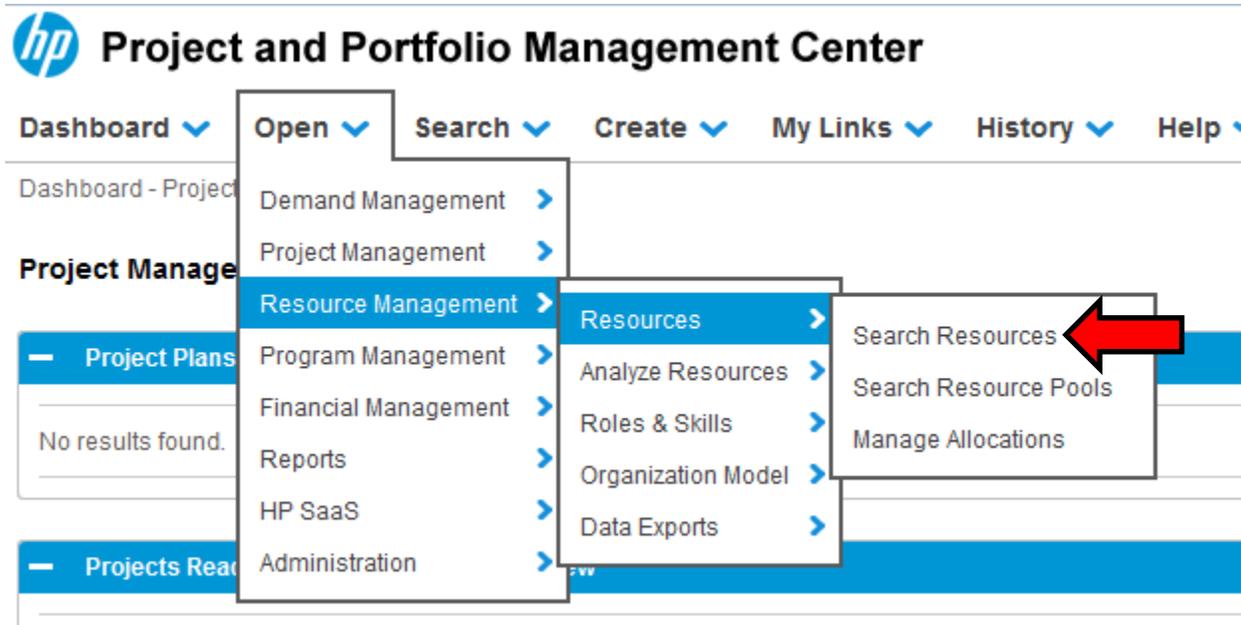
6. In the Sort window, select **Licensing** from the Sort by dropdown. Then click **OK**.



7. In your spreadsheet, if you scroll over to the Licensing column, you will see that your types of licenses are now sorted. Compare the number of “FULL” and “VIEW” licenses to the number shown on the License List from the PPM License Tracker spreadsheet.
8. If the number of licenses used is less than or equal to the number of licenses paid for by that agency, then the agency is fine. You can close out the exported spreadsheet. Continue to the next agency and repeat the process for each agency on the PPM License Tracker spreadsheet.
9. If the number of licenses used is more than the number purchased, you will need to contact, usually by email, the agency’s point of contact. Let them know they can either purchase additional licenses or edit their users’ access. If availability permits, they can convert a FULL to a VIEW or vice versa.

10. Return to the **Licensing by Agency** dashboard in the PPM Tool. If you scroll down, you will notice that certain agencies, such as OKDHS, show exactly 200 users. This is because the portlet can only display 200 users (including the NONE or Resource Only users). For agencies, such as OKDHS, with more than 200 users, you will have to view their licenses a different way. In the PPM Tool, go to:

Open < Resource Management < Resources < Search Resources

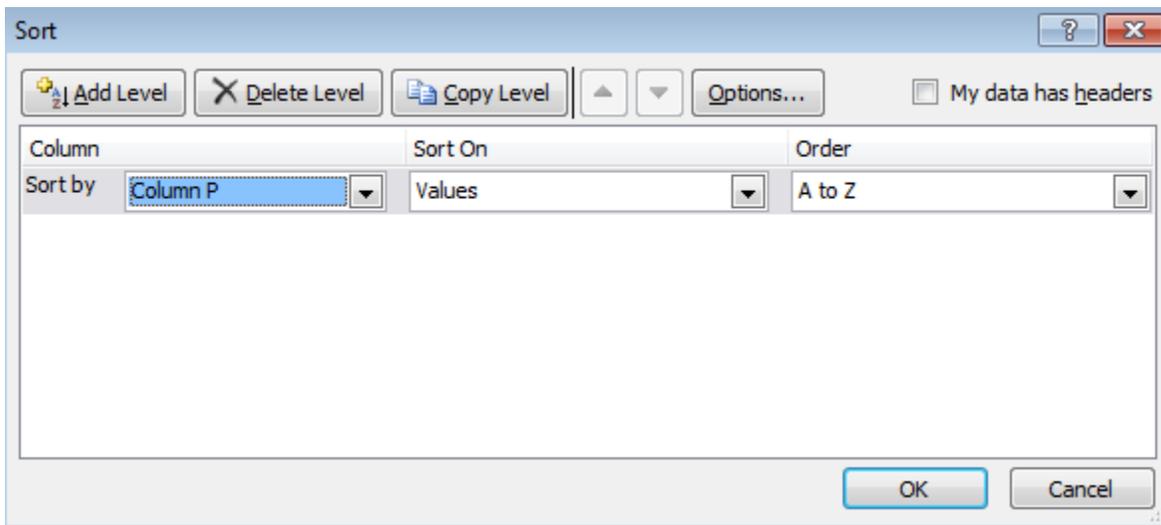


11. In the User Data section, select the agency from the **Business Unit (Agency)** dropdown. Next, change the **Results Displayed Per Page** to a number large enough to include each user. Then click the **Search** button.

The image shows the 'User Data' section of the PPM Tool. It includes a 'Business Segment' dropdown, a 'Business Unit (Agency)' dropdown set to 'Human Services Department - C', and a 'Licensing' dropdown. Below these are sorting options: 'Sort By' set to 'Username', 'Ascending' selected, and 'Descending' unselected. The 'Results Displayed Per Page' is set to 800.

12. When the list of users appears, click the **Export to Excel** link in the top left corner of the screen.
13. When the exported list appears, highlight only the rows containing the users' information. Click the **Data** tab and then click the **Sort** button.

- In the Sort window, select **Column P** from the Sort by dropdown. This should allow you to sort the users by the Licensing column. Then click **OK**.



- In your spreadsheet, if you scroll over to the Licensing column, you will see that your types of licenses are now sorted. Compare the number of “FULL” and “VIEW” licenses to the number shown on the License List from the PPM License Tracker spreadsheet.
- If the number of licenses used is less than or equal to the number of licenses paid for by that agency, then that agency is fine. You can close out the exported spreadsheet. Continue to the next agency with at least 200 users and repeat the process for each agency.
- If the number of licenses used is more than the number purchased, you will need to contact, usually by email, the agency’s point of contact. Let them know they can either purchase additional licenses or edit their users’ access. If availability permits, they can convert a FULL to a VIEW or vice versa.