

KAKAPO

SYSTEMS

UNITY PORTAL

License Allocation and Assignment Guide

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 User Templates

Communications Licenses

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

	License Type	Purchased	Allocated	Assigned
Purchases Allocations Assignments	UnityAgent Enterprise	4205	1211	3996
Purchases Allocations Assignments	UnityAgent Standard	50	15	48
Purchases Allocations Assignments	UnityContactCenterAgent Enterprise	3	0	3
Purchases Allocations Assignments	UnityCrmIntegration Standard	1000	0	56
Purchases Allocations Assignments	UnityDashboard Graphical	10	0	1
Purchases Allocations Assignments	UnityDesktop Enterprise	10	0	7
Purchases Allocations Assignments	UnityDesktop Pro	15260	1079	13638
Purchases Allocations Assignments	UnityReception Enterprise	10	0	1
Purchases Allocations Assignments	UnitySupervisor Enterprise	4		4
Purchases Allocations Assignments	UnitySupervisor Standard	1358		1215

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 Enterprise licences to the reseller. To do this I browse to the reseller and click on the Licence Details tab, as shown below.

System > Kakapo Systems Limited > 434738

Details Automatic Assignment Branding Portal User Accounts **License Details** Groups History Log User Templates Contact Center Call Center Activity

434738 Licenses

Unity licenses currently assigned to the users of this reseller.

<input type="checkbox"/> OFF Show All Licenses	License Type	Purchased	Allocated	Assigned
Purchases Allocations Assignments	UnityAgent Enterprise	0	0	6
Purchases Allocations Assignments	UnityAgent Standard	0	0	0
Purchases Allocations Assignments	UnityAgentWeb Standard	0	0	4
Purchases Allocations Assignments	UnityCallLogger Standard	0	0	0
Purchases Allocations Assignments	UnityContactCenter MediaStream	0	0	3
Purchases Allocations Assignments	UnityContactCenterAgent Add-On	0	0	3
Purchases Allocations Assignments	UnityContactCenterAgent Enterprise	0	0	2
Purchases Allocations Assignments	UnityContactCenterDesktop Enterprise	0	0	1
Purchases Allocations Assignments	UnityContactCenterReception Enterprise	0	0	1

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

UnityDesktop Enterprise Purchase Details

Order Date	Ordered By	Purchase Order	Invoice Number	Licenses Purchased	Sub Purchase

Cancel Add Sub-Purchase Add Internal Licenses

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.

New License Purchase

Purchase Order Ref: PO-2911

Licenses To Purchase: 30

Automatically assign this license: ON Automatic assignment is currently set to Enterprise for this application

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 Desktop Enterprise licence are allocated to the reseller, as we can see in the Licence Details list for this reseller.

Licenses

Unity licenses currently assigned to the users of this reseller.

<input type="checkbox"/> OFF Show All Licenses	License Type	Purchased	Allocated	Assigned
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityAgent Enterprise	0	0	8
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityAgent Standard	0	0	1
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityAgentWeb Standard	0	10	11
<input type="button" value="Purchases"/> <input type="button" value="Allocations"/> <input type="button" value="Assignments"/>	UnityCallLogger Standard	0		1

10 licences have been allocated

You can also see from the above screenshot that this reseller has allocated 10 Agent Web 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 User Templates

Qudo Automatic Purchase Details Automatic Assignment.

License Expiry Prompt:

User Login Failed Prompt:

Call Center Login Failed Prompt:

Purchase Page URL:

License Oversell Permission: No Limit

Automatic License Assignment
 Trial License Functionality
 User Template Assignments

New Licence Oversell Permission settings

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.

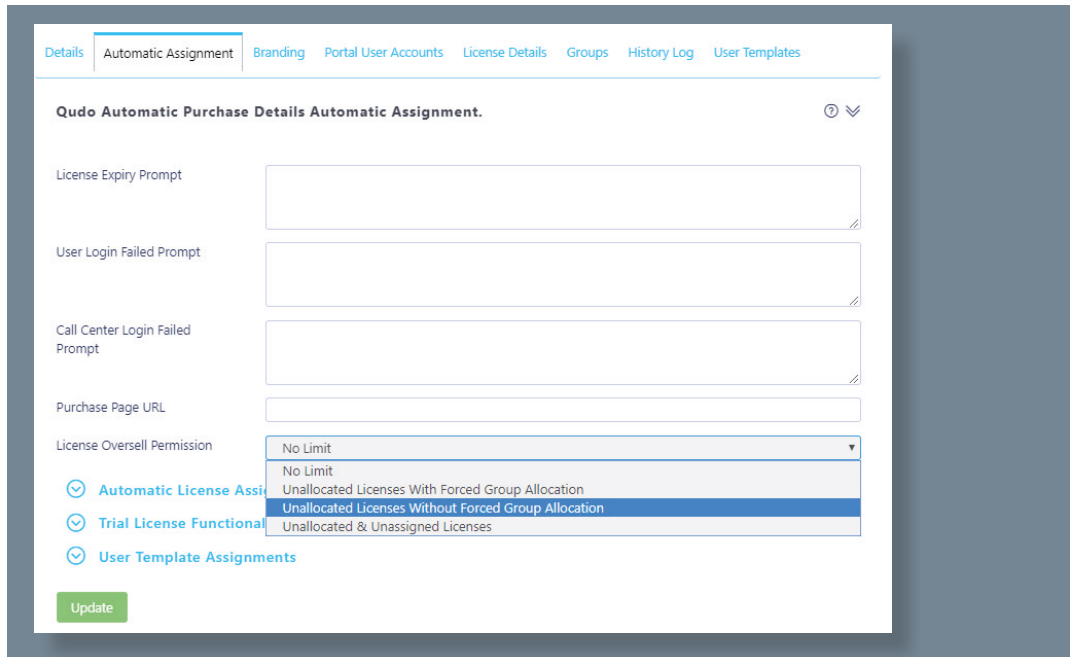
UNALLOCATED LICENCES WITHOUT FORCED GROUP ALLOCATION

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 five licences allocated then only five 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:



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 reseller. We have already seen in the Licence Details list for this reseller (above) that they have allocated 10 licences and assigned 11 Unity Agent Web 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.

The oversell permission cannot be set to 'Unallocated & Unassigned Licences' 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.

In order to change the licence oversell permission to Unallocated and Unassigned Licences for this reseller, at least 11 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.

Licenses
Unity licenses currently assigned to the users of this reseller.

<input type="checkbox"/> OFF Show All Licenses			License Type	Purchased	Allocated	Assigned
Purchases	Allocations	Assignments	UnityAgent Enterprise	0	50	1025
Purchases	Allocations	Assignments	UnityAgent Trial	0	0	7
Purchases	Allocations	Assignments	UnityAgentWeb Standard	30	10	11
Purchases	Allocations	Assignments	UnityAgentWeb Trial		0	1
Purchases	Allocations	Assignments	UnityContactCenter MediaStream		0	41
Purchases	Allocations	Assignments	UnityContactCenterAgent Add-On	0	0	6

30 licences now allocated

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

Automatic Purchase Details Automatic Assignment.

License Expiry Prompt: Your trial license has expired. Please contact your telephony service provider to arrange license purchase.

User Login Failed Prompt: [Empty text area]

Call Center Login Failed Prompt: [Empty text area]

Purchase Page URL: [Empty text area]

License Oversell Permission: Unallocated & Unassigned Licenses

- Automatic License Assignment
- Trial License Functionality
- User Template Assignments

Update

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.

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:

Automatic Purchase Details Automatic Assignment.

License Expiry Prompt: Your trial license has expired. Please contact your telephony service provider to arrange license purchase.

User Login Failed Prompt: [Empty text area]

Call Center Login Failed Prompt: [Empty text area]

Purchase Page URL: [Empty text area]

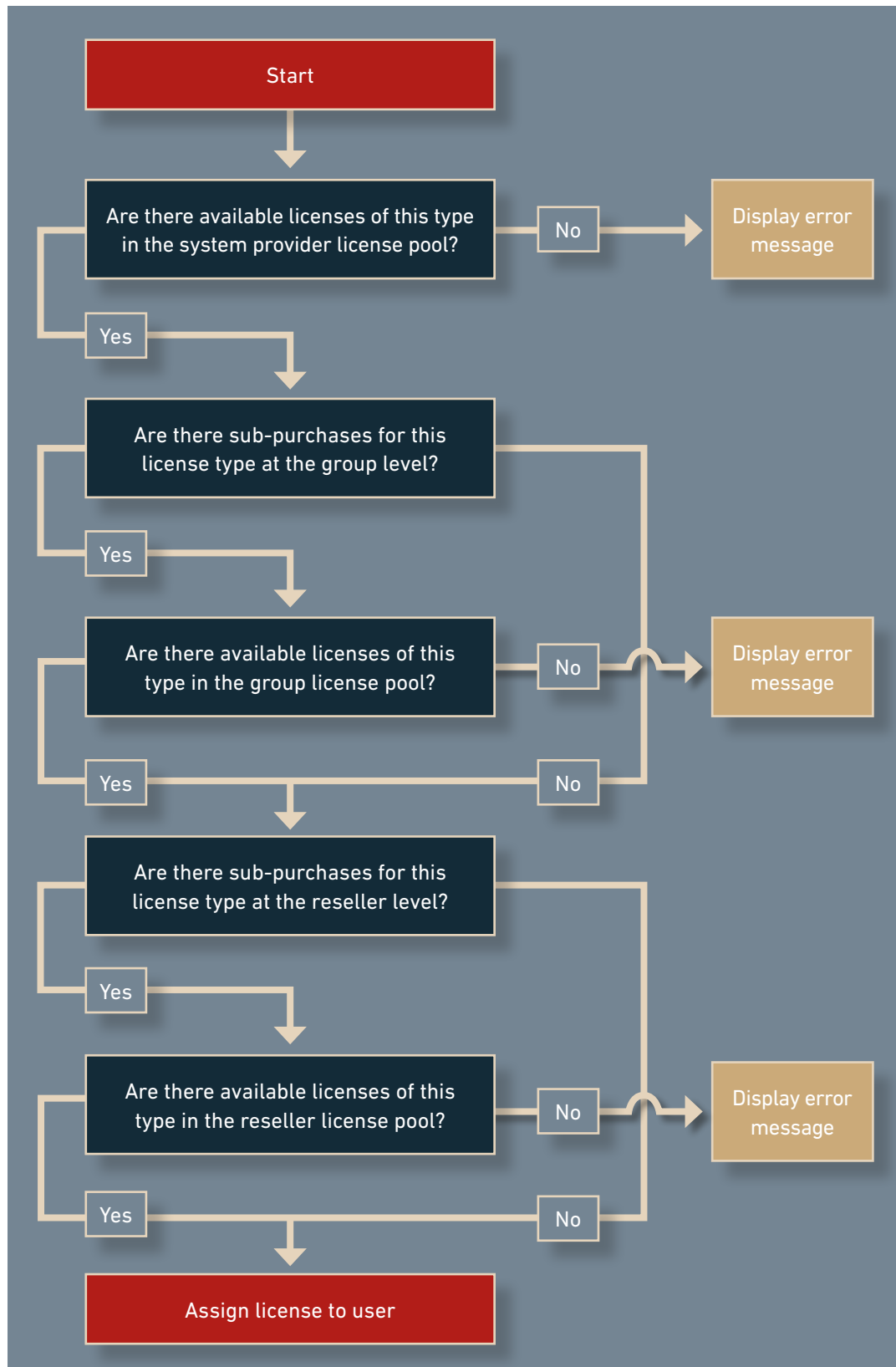
License Oversell Permission: Unallocated & Unassigned Licenses

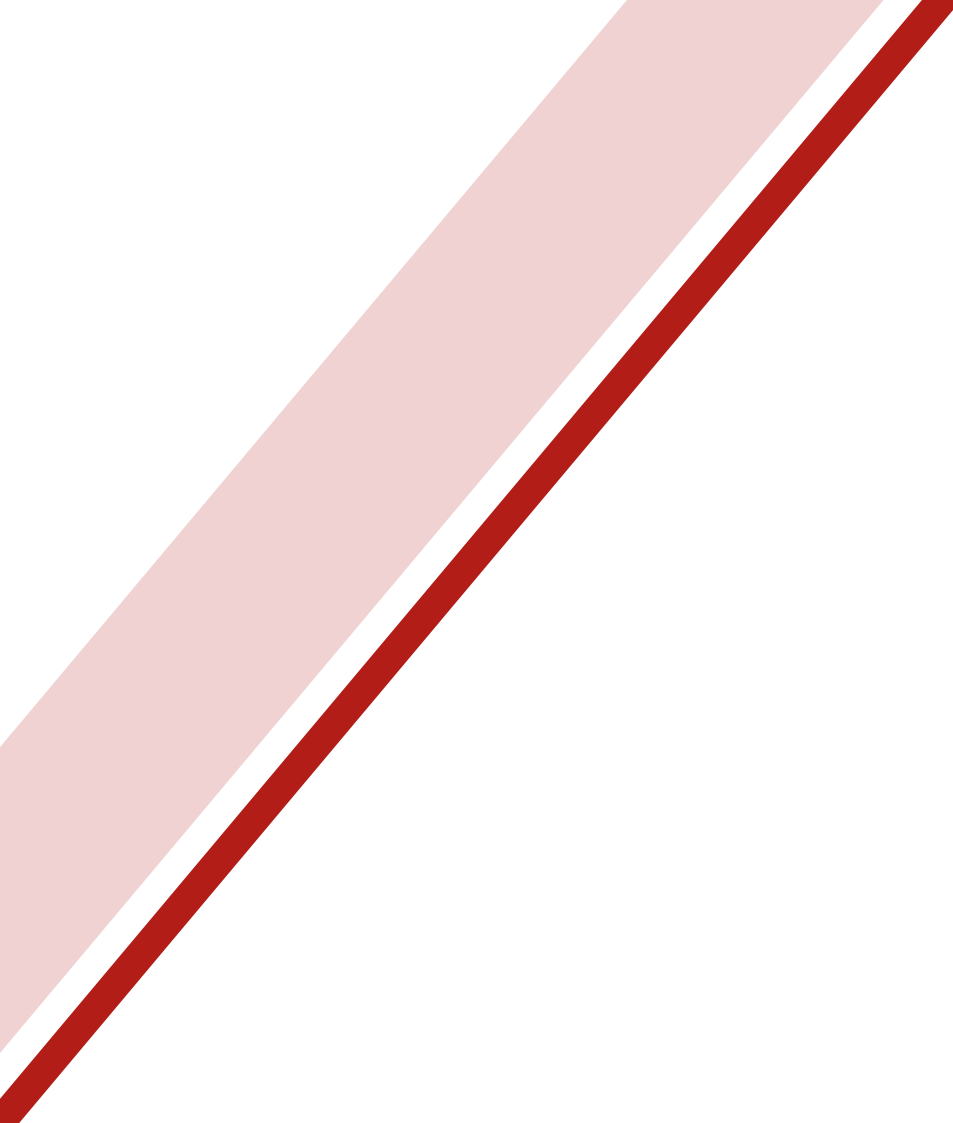
- Automatic License Assignment
- Trial License Functionality
- User Template Assignments

Update

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:





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T +44 (0)207 084 6845

E tellmemore@kakaposystems.com

W www.kakaposystems.com

International House | 36-38 Cornhill | London | EC3V 3NG

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