FlexNet Operations LLM

Producer Portal User Guide

Legal Information

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FlexNet Operations LLM Producer Portal User Guide

FlexNet Operations LLM (License Lifecycle Management) is a software solution designed to manage and optimize the lifecycle of software licenses. It provides capabilities for software producers and high-tech manufacturers to effectively handle licensing, entitlement management, and software delivery.

FlexNet Operations LLM Producer Portal is the application used to manage members, products, and entitlements on the FlexNet Operations LLM service. FlexNet Operations LLM Producer Portal is a secure web based application that is accessible with any current generation web browser.

Information about how to use the FlexNet Operations LLM Producer Portal is described in the sections listed in the following table.

Table 1-1 ▪ FlexNet Operations LLM Producer Portal User Guide

Topic	Content
Introduction to FlexNet Operations LLM Producer Portal	Introduction to the concepts in FlexNet Operations LLM and the Producer Portal.
Accounts & Members	Describes FlexNet Operations LLM Producer Portal internal users/accounts and how to manage user permissions.
Entitlements	Provides an explanation of the processes necessary for managing software entitlements, and also includes the best practice for processing entitlement-related transactions.
Features	Describes many of the features used in FlexNet Operations LLM.
Product Management	Provides insights on product management support.
Transactions	Explains how to view transactions, and in the case of failed transactions to edit and resubmit them.
FlexNet Publisher Licensing	Describes FlexNet Publisher certificate style licensing in FlexNet Operations LLM.

Table 1-1 ▪ FlexNet Operations LLM Producer Portal User Guide (cont.)

Topic	Content
FlexNet Embedded Licensing	Describes FlexNet Embedded licensing in FlexNet Operations LLM.
Usage Search	Describes how to use the **Usage Search** function to find the usage and drill down to various statistics and graphs
User Defined Fields (UDFs)	Describes in the user-defined fields (UDFs) used in FlexNet Operations LLM.
FlexNet Operations LLM Support Process	Describes the FlexNet Operations LLM support process.
Administer	Explains how to perform administrative tasks.
Technical Reference	Lists the state and province codes for the U.S. and Canada, as well as the Country Codes used in FlexNet Operations LLM.
FlexNet Operations LLM Web Services Implementation	Examples of FlexNet Operations LLM API commands.

Product Support Resources

The following resources are available to assist you:

- Revenera Product Documentation
- Revenera Community
- Revenera Learning Center
- Revenera Support

Revenera Product Documentation

You can find documentation for all Revenera products on the Revenera Product Documentation site:

https://docs.revenera.com

Revenera Community

On the Revenera Community site, you can quickly find answers to your questions by searching content from other customers, product experts, and thought leaders. You can also post questions on discussion forums for experts to answer. For each of Revenera's product solutions, you can access forums, blog posts, and knowledge base articles.

https://community.revenera.com

Revenera Learning Center

The Revenera Learning Center offers free, self-guided, online videos to help you quickly get the most out of your Revenera products. You can find a complete list of these training videos in the Learning Center.

https://learning.revenera.com

Revenera Support

For customers who have purchased a maintenance contract for their product(s), you can submit a support case or check the status of an existing case by first logging into the Revenera Community, clicking **Support** on the navigation menu to open the **Support Hub** page, and then clicking the **Open New Case** or **Case Portal** button.

Contact Us

Revenera is headquartered in Itasca, Illinois, and has offices worldwide. To contact us or to learn more about our products, visit our website at:

http://www.revenera.com

You can also follow us on social media:

- Facebook
- LinkedIn
- YouTube
- Instagram

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Introduction to FlexNet Operations LLM Producer Portal

FlexNet Operations LLM Producer Portal is the application used to manage Members, Products, and Entitlements of FlexNet Operations LLM. FlexNet Operations LLM Producer Portal is a secure web based application that is accessible with any current generation web browser.

For the purpose of granting access to FlexNet Operations LLM Producer Portal, the functions are divided into three groups:

- Account/Member/Entitlement
- Product Management
- Email Templates

These groupings generally correspond to the “order processing” and/or “customer support” role, the “product manager” role, and the “product marketing” role respectively at a software publisher. An individual user may have access to one or more of these role-based groupings. Other functionality, e.g., viewing transaction reports, is available to all FlexNet Operations LLM Producer Portal users.

Information about FlexNet Operations LLM Producer Portal is presented in the following sections:

- Overview of FlexNet Operations LLM Producer Portal
- Product Management
- Email
- Entitlements

Overview of FlexNet Operations LLM Producer Portal

This section explains how to access FlexNet Operations LLM Producer Portal, introduces you to the navigation, and explains how to access help resources and perform searches.

- Access and Login

- Navigation
- Help
- Searches

Access and Login

To access FlexNet Operations LLM Producer Portal, open a web browser and enter the below URL for the FlexNet Operations LLM Producer Portal you wish to access:

Table 2-1 ▪ FlexNet Operations LLM Producer Portal URLs

Environment	URL
User Acceptance Testing Environment	https://manageruat.flexnetoperations.com
Production Environment	https://manager.flexnetoperations.com

The following screen opens:

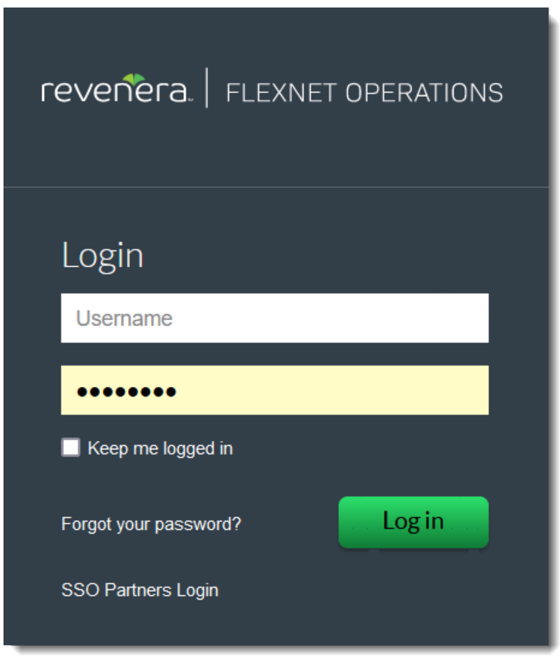


Figure 2-1: Login to FlexNet Operations LLM Producer Portal

Enter your Login ID and Password and click Login.

***Note ▪** If you forget your password or Login ID, click the **Forgot your password?** link. Simply provide your email address and this information will be emailed to you.*

Navigation

FlexNet Operations LLM Producer Portal is navigated via tabs and menus. Each tab represents a major area of functionality. Sub-menus within the tabs provide access to specific functions.

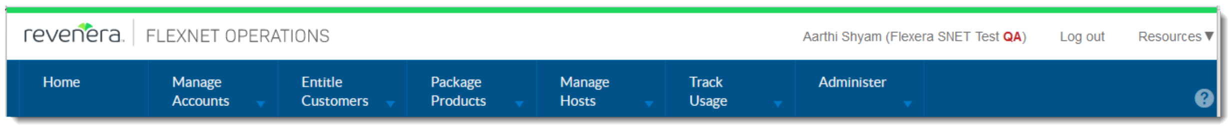


Figure 2-2: FlexNet Operations LLM Producer Portal Navigation Bar

The major components of FlexNet Operations LLM Producer Portal (tabs) are:

- **Manage Accounts**
- **Entitle Customers**
- **Package Products**
- **Manage Hosts**
- **Track Usage**
- **Administer**

Sub-menus also appear for the above mentioned tabs. For instance, the screen below shows sub-menu items for **Manage Accounts** tab.

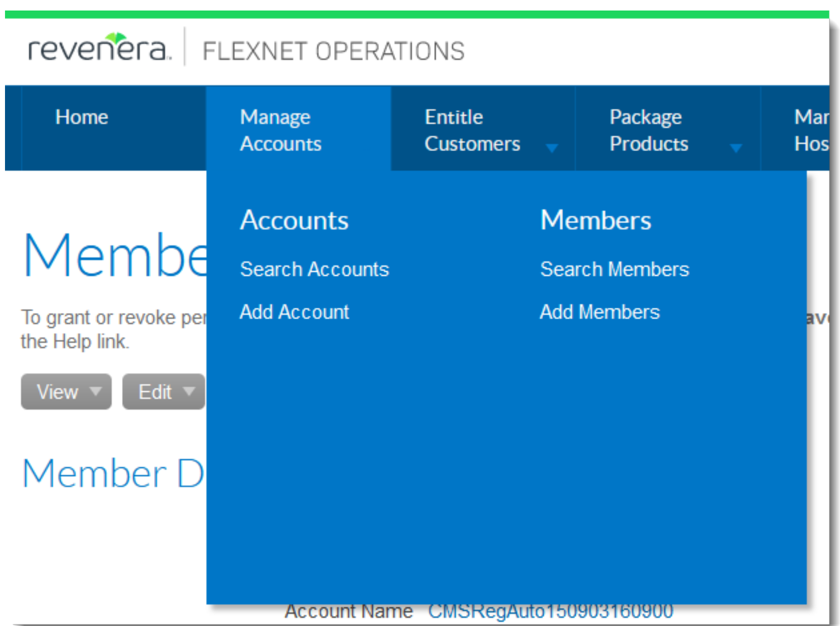


Figure 2-3: Manage Accounts Sub-Menu Items

The top navigation bar also contains a Help icon to access product **Documentation**, and a **Resources** menu:

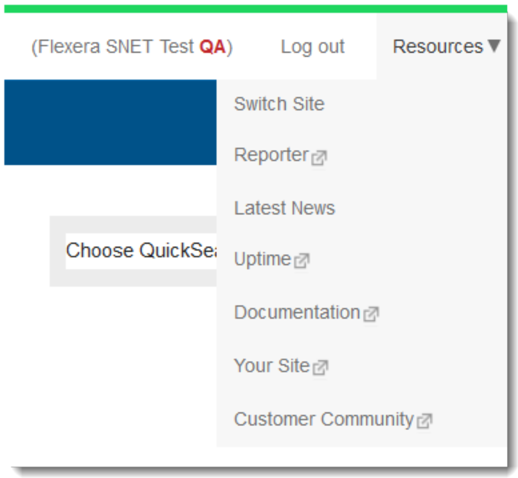


Figure 2-4: Resources Menu

The **Resources** menu offers the following selections:

- A link to **Switch Site** (if you manage more than one FlexNet Operations LLM site).
- A link to FlexNet Operations LLM **Reporter**

  Important ▪ *Access to Reporter is permission driven. For more information, see User Permissions and the FlexNet Operations Reporter User Guide.*

- The **Latest News** about FlexNet Operations LLM
- A link to view product **Uptime** on the Revenera Status page
- A link to the **Documentation** for FlexNet Operations LLM Producer Portal
- A link to **Your Site**
- A link to the **Revenera Community**

Help

For the online help, click on the **Help** icon in the navigation bar or select **Documentation** on the **Resources** menu.

You can also get Quick Help by mousing over field labels. Where available, a small popup window will display field usage, expected formats, and/or character limits.

For instance, while on the **Add a Product** page, mouse over the **Product Name** field. The underline indicates there is help available. Click on the **Product Name** label to view the details in the pop-up display. The following displays the quick help popup window for the **Product Name** field:

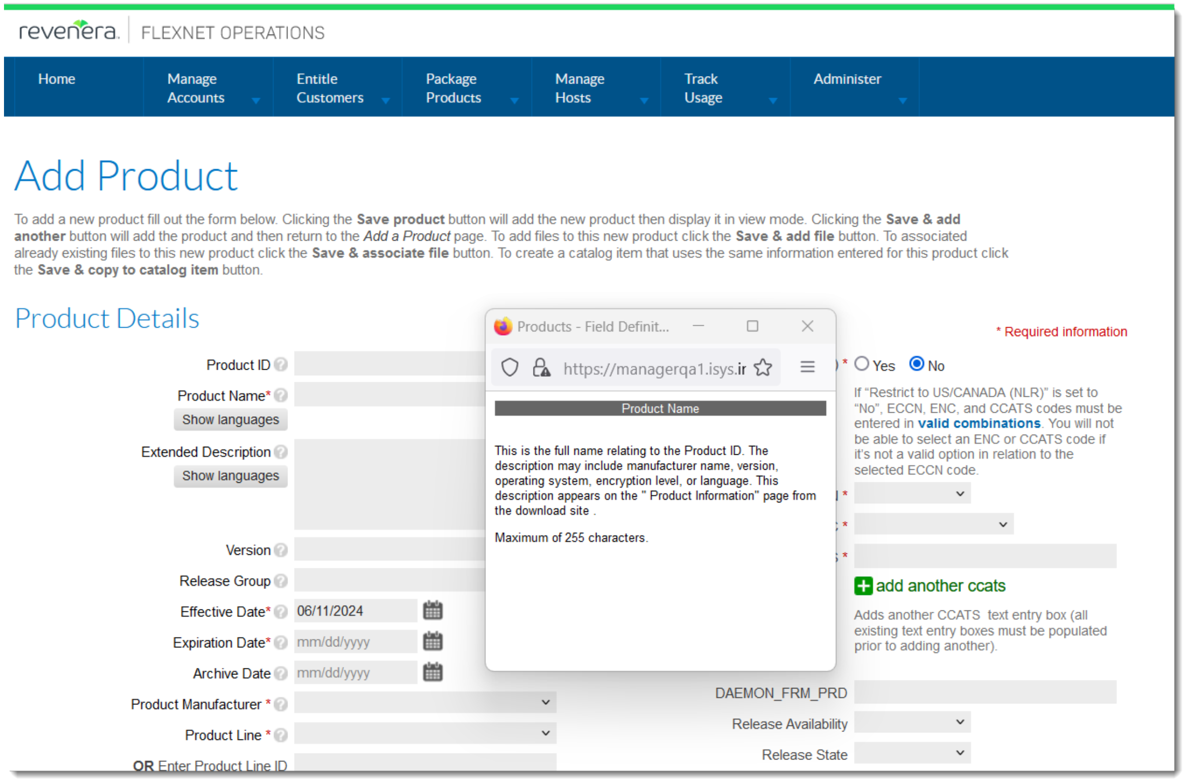


Figure 2-5: Quick Help for the Product Name Field

Searches

Throughout FlexNet Operations LLM Producer Portal, you have multiple options to perform searches:

- Quick Search on Home Page
- Full Search
- Quick Search On Producer Portal Pages

Quick Search on Home Page

You can use the **Quick Search** area on the **Home** page to search for items on one of the listed tabs.

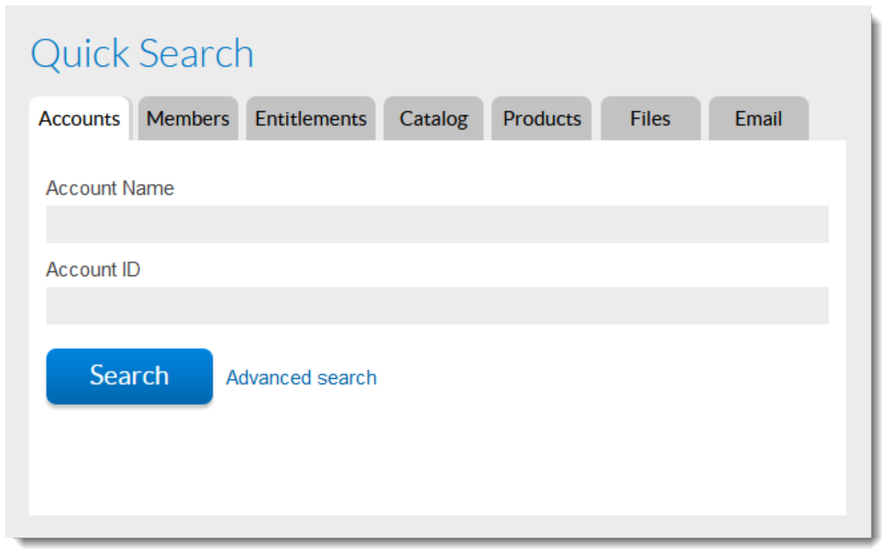


Figure 2-6: Quick Search on Home Page

Full Search

You can perform a full search for accounts, members, entitlements, license tokens, catalog items, products, files, product lines, devices, license servers, served clients, device models, license hosts, emails, bounced emails, transactions, or batches by making a selection from the top navigation submenus. The submenu shows the search options on the **Package Products** menu.

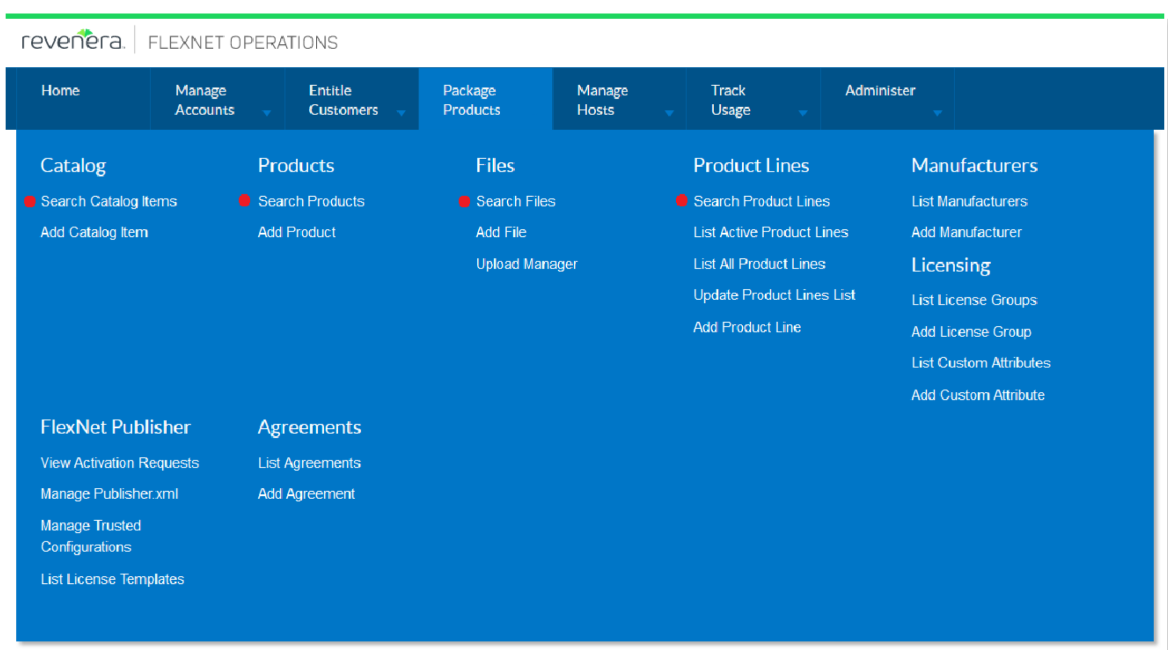


Figure 2-7: Full Search Options on Submenu

The following are the fields displayed when performing a full search for a product:

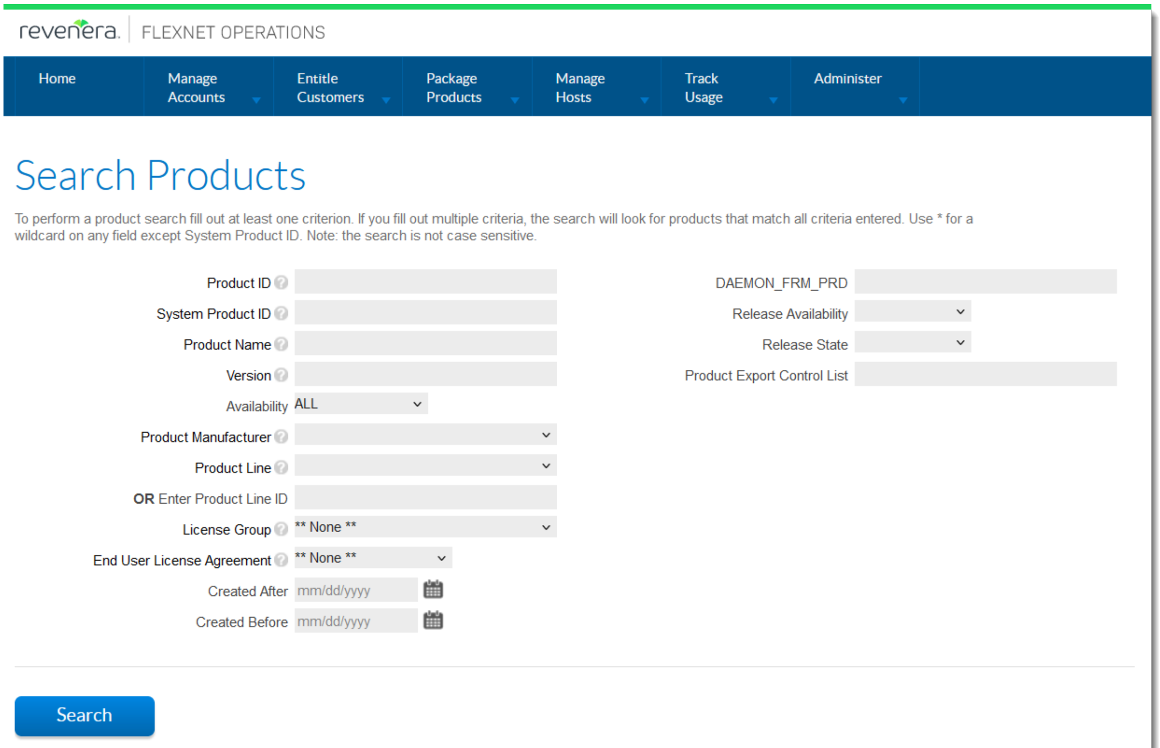


Figure 2-8: Full Search for a Product

Quick Search On Producer Portal Pages

On many of the Producer Portal pages, you can use the **Quick Search** controls to perform a search.

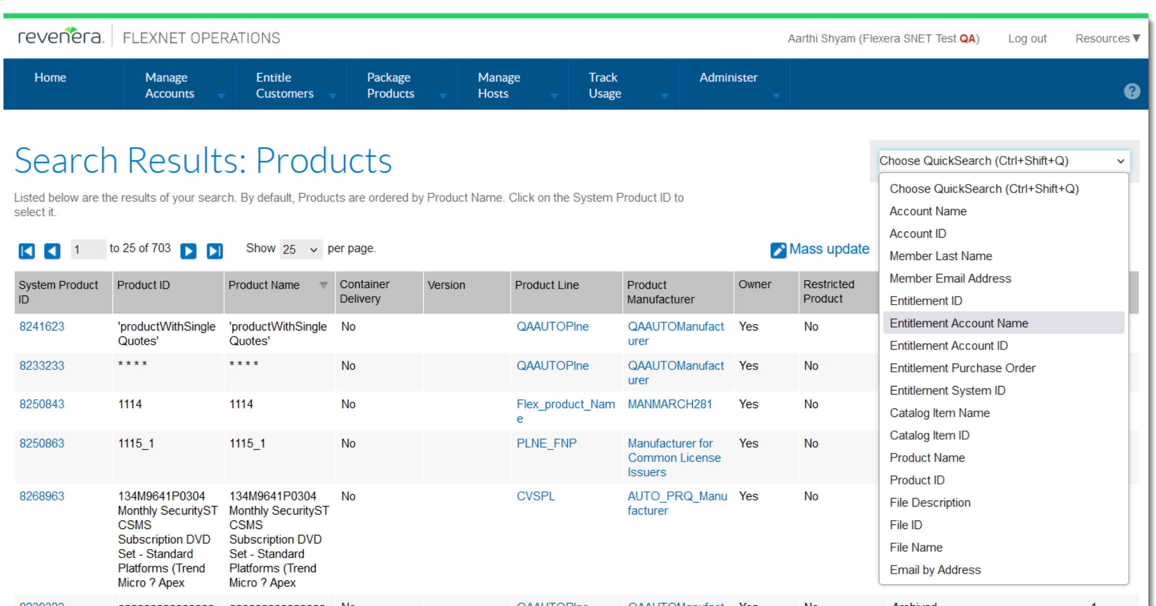


Figure 2-9: Quick Search Controls on Producer Portal Page

After you select a property to search by, you can enter search criteria in the text box:

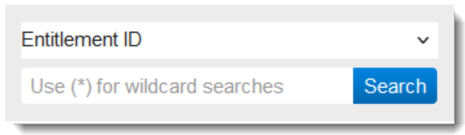


Figure 2-10: Search Criteria in Quick Search Control

Product Management

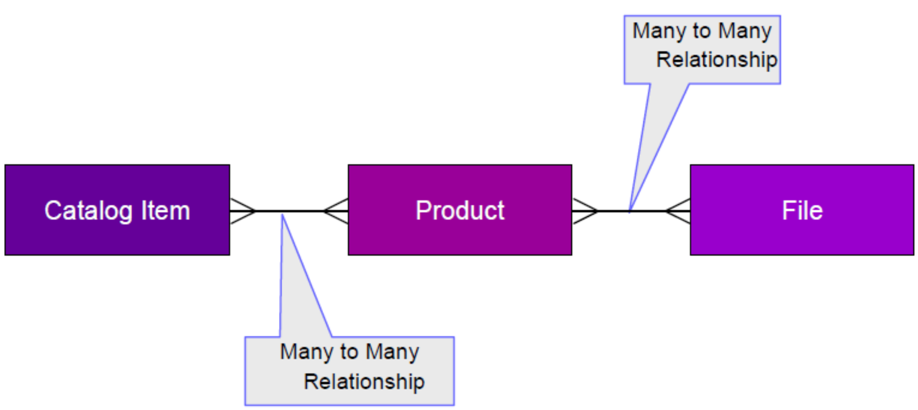
This section explains the concepts behind managing products in FlexNet Operations LLM Producer Portal and how to set them up.

- Product Configuration Relationships
- Catalog Item Concepts
- Product Concepts
- File Concepts
- Examples of Product Hierarchy
- Setting Up Products

Product Configuration Relationships

You manage products at the following three different levels through FlexNet Operations LLM Producer Portal:

- Catalog Items (also known as part numbers or SKUs).
- Products (also called versions or releases).
- Files (the binary images that customers download).



From the FlexNet Operations LLM End User Portal, a user would click through the following levels to drill down to the next level.

Manufacturer* > Catalog Item Product Line* > Product Product Line* > Product > Files

***Note** ▪ The asterisk (*) symbol indicates that level ends if there is just one choice.*

Catalog Item Concepts

Catalog Items (price list items) represent the things that your company sells. For example, this could be a product or a maintenance agreement. Catalog Items have attributes such as a unique identifier (ID), default duration, whether it includes updates (such as maintenance), and what product line it belongs to.

When you Entitle your customers (or process orders) in FlexNet Operations LLM, you entitle them to Catalog Items. Catalog Items can contain one or more Products, and can be used to create a bundled “suite” of products delivered together.

You may also sell the same set of products or files under more than one part number.

Product Concepts

Products (product releases) represent the things that your company wants delivered. For example, this could be a specific version, release or service pack. Products have attributes such as a unique identifier (ID), version number, release dates, and what product line it belongs to.

The Product that you add through FlexNet Operations LLM Producer Portal is also a logical grouping of one or more downloadable Files, and can be associated with one or more Catalog Items.

More key elements of Products include:

- Effective and Expiration dates overlap with Entitlement date ranges to create a dynamic end user view,
- Export classification information, which is required to be able to export products outside the United States,
- Customizable download instructions for the set of files contained therein, and
- May contain a click-through or end user license agreement (EULA).

File Concepts

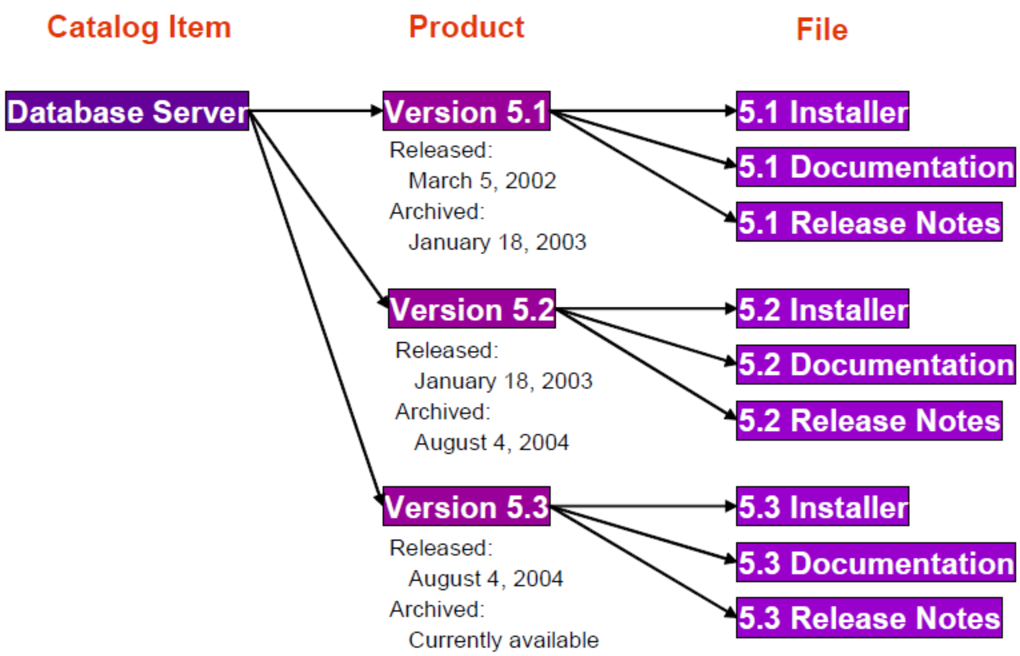
Files (images) are the actual software binary files that the end user downloads. For example, this could be a specific installation executable for a particular platform. Files have attributes such as a unique identifier (ID), a file description and file name.

Files which are part of the same release are grouped together into one or more Products which are in turn entitled through Catalog Items.

Files can also be readme files or product documentation such as an install guide or user’s manual.

Examples of Product Hierarchy

The following diagrams show sample product hierarchies:



Product Version	Release Date
5.1	Mar 05, 2002
5.2	Jan 18, 2003
5.3	Aug 04, 2004

Customer Entitlement Dates	Products Available
04/10/2002 to 04/10/2003	5.1, 5.2
03/15/2003 to 03/15/2003	5.2
12/15/2002 to12/15/2004	5.1, 5.2, 5.3

Figure 2-11: Product Hierarchies / Example 1

The following diagram is another example of product hierarchies.

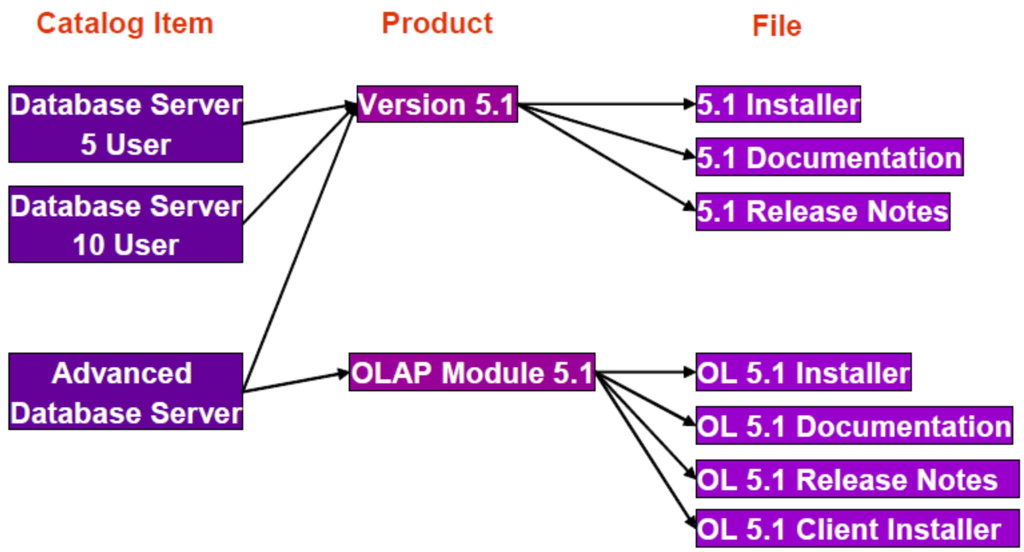


Figure 2-12: Product Hierarchies / Example 2

Setting Up Products

To set up products in FlexNet Operations LLM, you need to perform the following steps:

- Step 1: Plan
- Step 2: Create a Manufacturer
- Step 3: Create a Product Line
- Step 4: Create an Agreement
- Step 5: Add Catalog Items
- Step 6: Add Products
- Step 7: Associating Products to Catalog Items
- Step 8: Add Files
- Step 9: Associating Files to Products

Step 1: Plan

Perform the following planning steps:

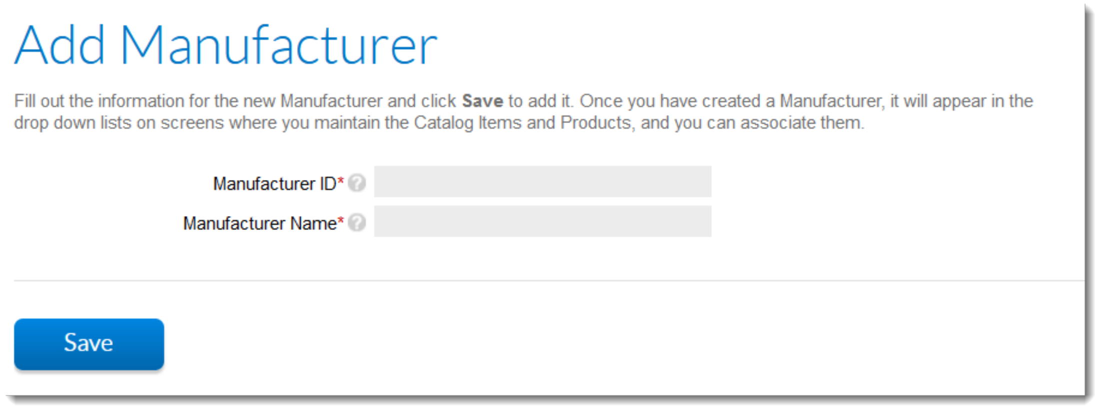
- Begin your plan of action by gathering a list of files and determining how to group these files. These groupings become your Products. Sets of files grouped together by versions, platforms or languages are all good candidates.
- Gather a list of SKUs to entitle your customers to, and determine how the SKUs map to the products.
- Visualize the relationships (Excel or Visio are useful tools for visualization).

Step 2: Create a Manufacturer

More than one Manufacturer of the software you distribute can be represented in our system. The ‘Manufacturer’ is an attribute of both Product and Catalog Items.

Task ***To create a Manufacturer:***

1. On the **Package Products** menu, click **Add Manufacturer**. The **Add Manufacturer** page opens.



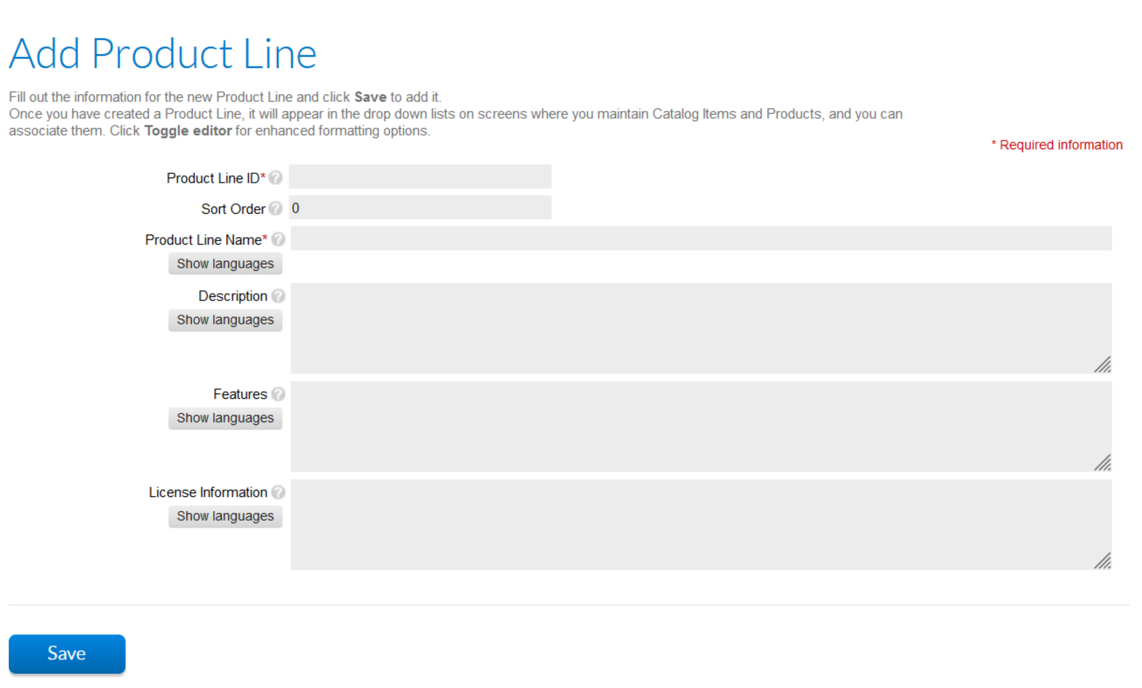
2. Enter the required data in the **Manufacturer ID** and **Manufacturer Name** fields, and then click **Save**.

Step 3: Create a Product Line

Product Lines are attributes of both Catalog Items and Products, and are used for navigational purposes both in the Producer Portal and on the End User Portal.

Task ***To create a Product Line:***

1. On the **Package Products** menu, click **Add Product Line**. The **Add Product Line** page opens.



2. Enter the required details in **Product Line ID** and **Product Line Name** fields (the other fields are optional) and then click **Save**.

Step 4: Create an Agreement

A click-through or End User License Agreement (EULA) commonly contains content supplied by your legal department. The end-user is prompted to ‘Agree’ to the terms before proceeding to the download page. The Agreement is an attribute of a Product.

Task ***To create an Agreement:***

1. On the **Package Products** menu, click **Add Agreement**. The **Add Agreement** page opens.

2. Enter the required data in the **Agreement Name** and **Agreement Content** fields.

Tip ▪ *Click the* ***Toggle Editor*** *button under the* ***Agreement Content*** *field to access a formatting toolbar that you can use to format the text. The content supports HTML formatting, which is highly recommended. To enter content in HTML format, click the* ***HTML*** *button in the Editor toolbar to open the* ***HTML Source Editor****.*

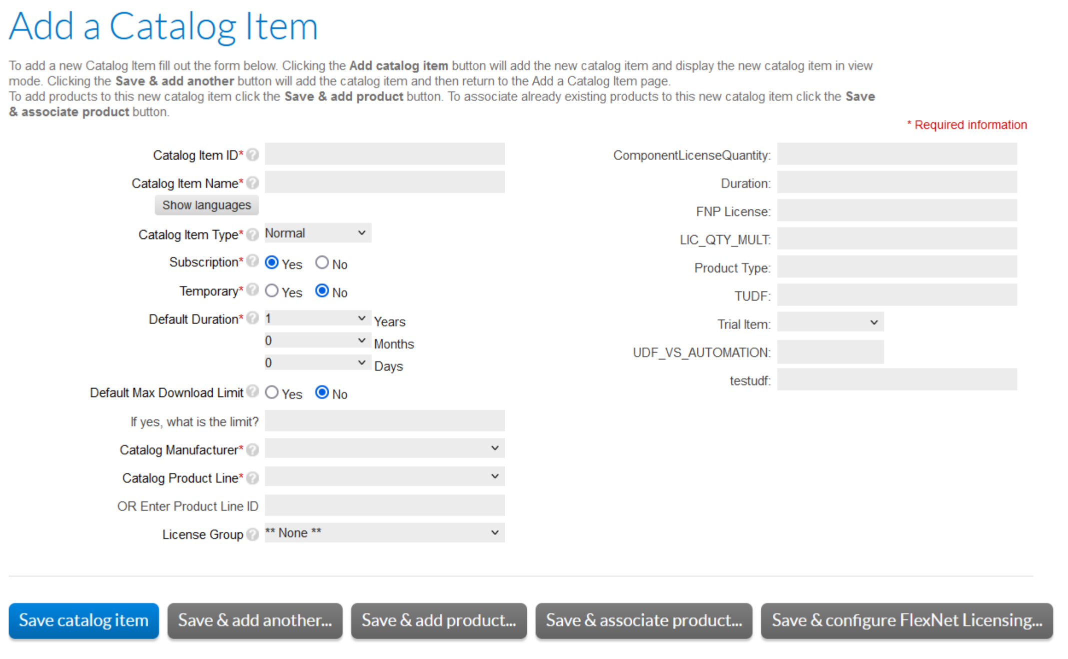
3. Click **Save**.

Step 5: Add Catalog Items

Catalog Items need to exist before Entitlements (orders) can be processed and before Products can be associated to them.

Task ***To add Catalog Items:***

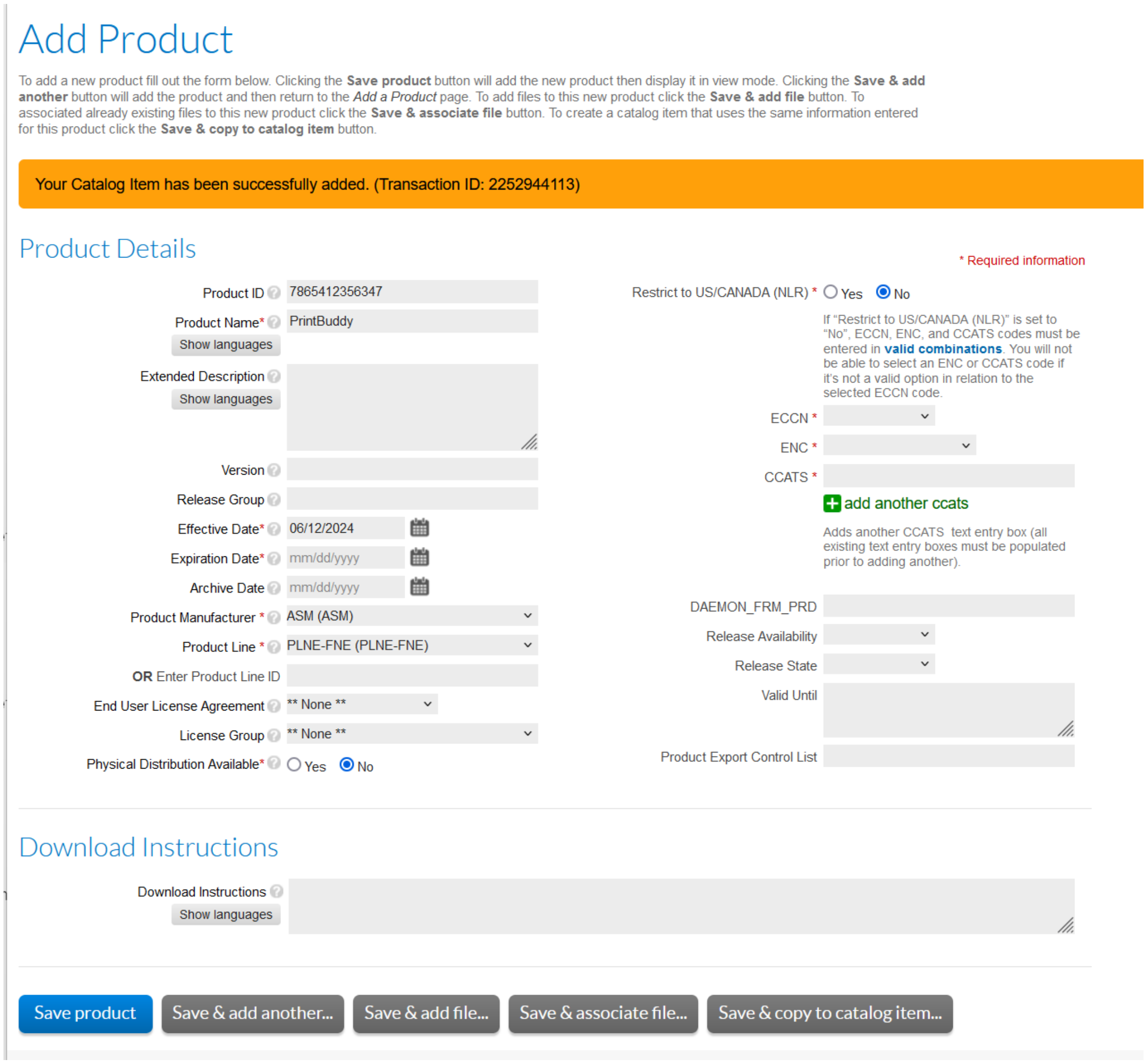
1. On the **Package Products** menu, click **Add Catalog Item**. The **Add a Catalog Item** page opens.



2. Enter the required data in the following fields (and leave remaining fields set to defaults):

    - **Catalog Item ID**—The unique SKU or ID to which customers will be entitled.
    - **Catalog Item Name**—The name of the item.
    - **Catalog Manufacturer**—The Manufacturer of the item.
    - **Catalog Product Line**—The Product Line that items appear in.

3. If there is a 1-1 relationship between Catalog Item and Product, then click **Save & add product...** to complete this transaction. The **Product Details** area of the **Add Product** page opens.



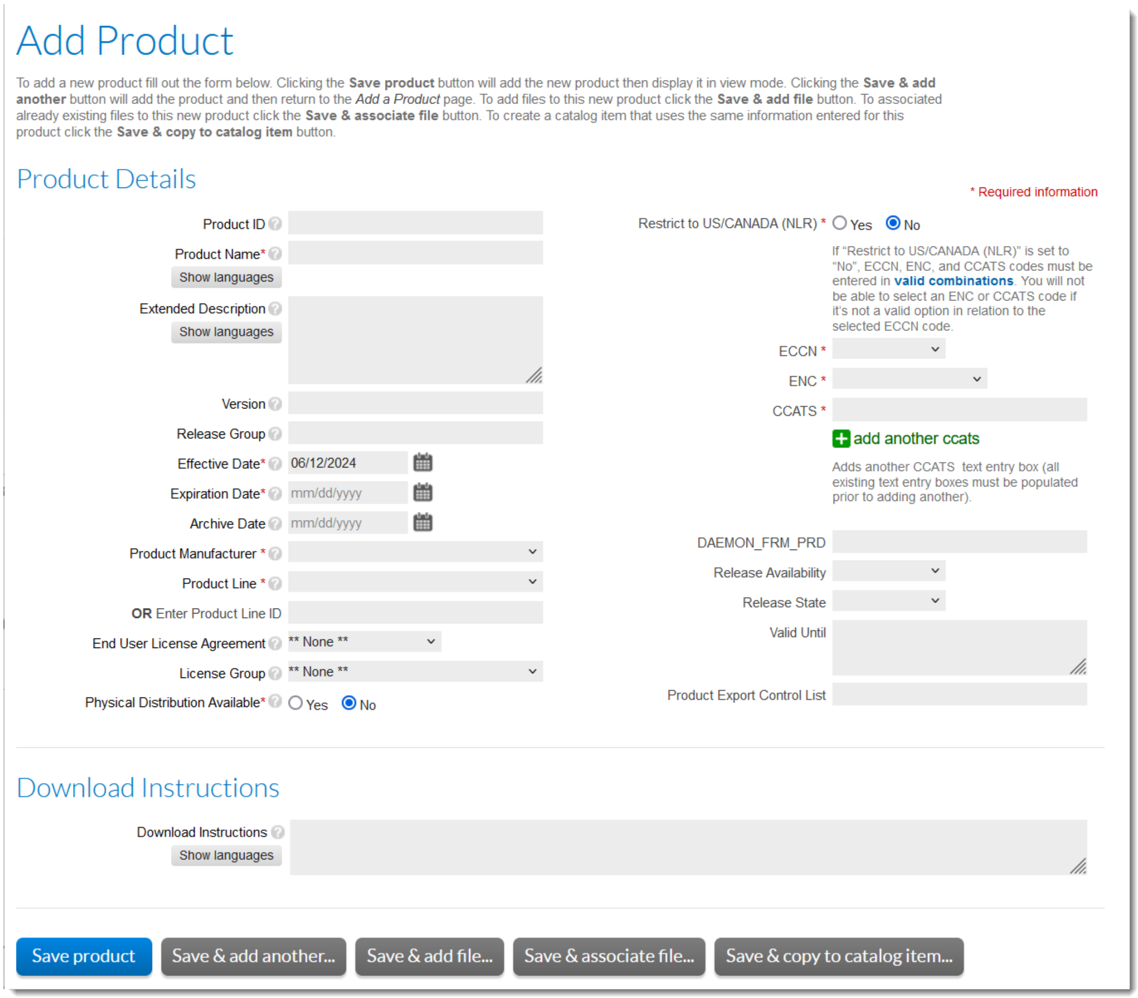
***Note** ▪ Alternately, you can also click **Save & add another...** or **Save & associate product...** or **Save & configure FlexNet Licensing...**.*

Step 6: Add Products

Products need to exist before they can be associated to Catalog Items as well as have Files associated to them.

Task ***To add Products:***

1. On the **Package Products** menu, click **Add Product**. The **Add Product** page opens.

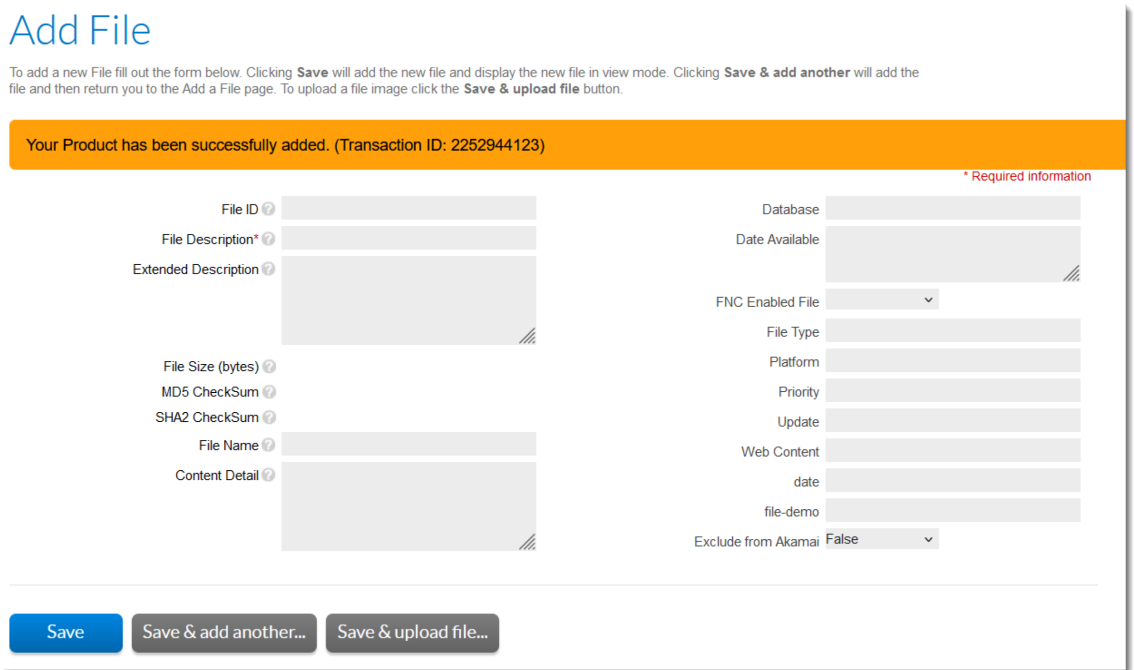


2. Enter the required data in the following fields (leave remaining fields set to defaults):

   - **Product ID**—Unique ID used to associate to Catalog Items and Files
   - **Product Name**—Displayed to end users
   - **Version**—The version of the Product
   - **Effective Date**—Date when the Product becomes available on the site
   - **Expiration Date**—Date when the Product moves to the archive tab, or is no longer accessible to Entitlement Lines with starting dates after this same date
   - **Product Manufacturer**—The Manufacturer of the item
   - **Product Line**—The Product Line in which the Product appears
   - **End User License Agreement**—Optional click-through agreement

- **Download Instructions**—Text or HTML displayed on the page above the list of files
- **ECCN**—Set to No Export unless you know the ECCN, ENC, and CCATS codes.

3. If there is a 1-1 relationship between Product and File, then click on the **Save & add file...** button to complete this transaction. The **Add File** page opens.



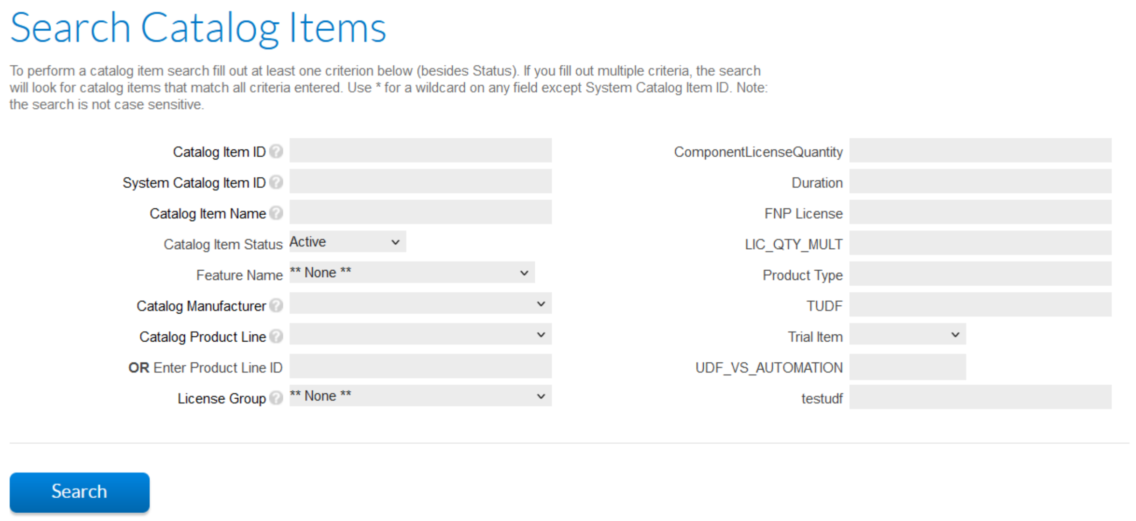
***Note ▪** Alternately, you can also click on the **Save & add another...**.*

Step 7: Associating Products to Catalog Items

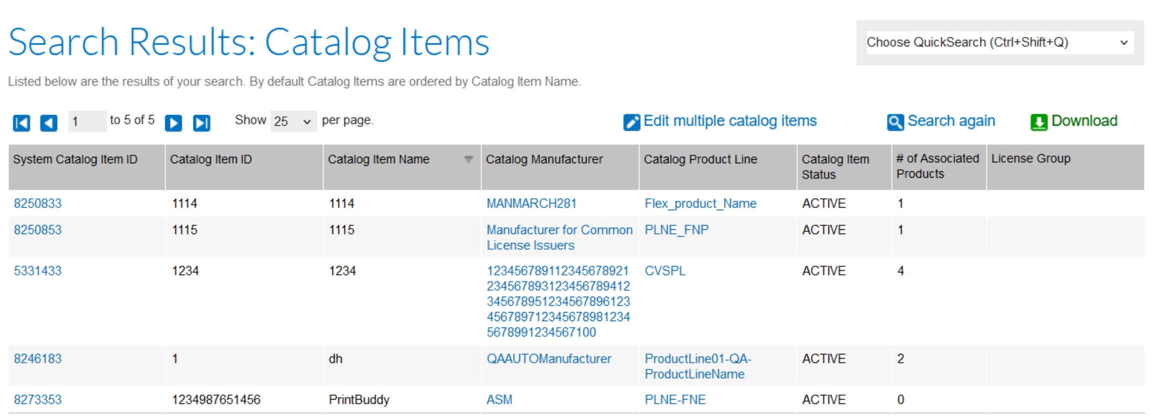
If you need to manually associate Product to Catalog Items after they are created, you can do so by performing the following steps.

Task ***To associate Product to Catalog Items:***

1. On the **Package Products** menu, click **Search Catalog Items**. The **Search Catalog Items** page opens.

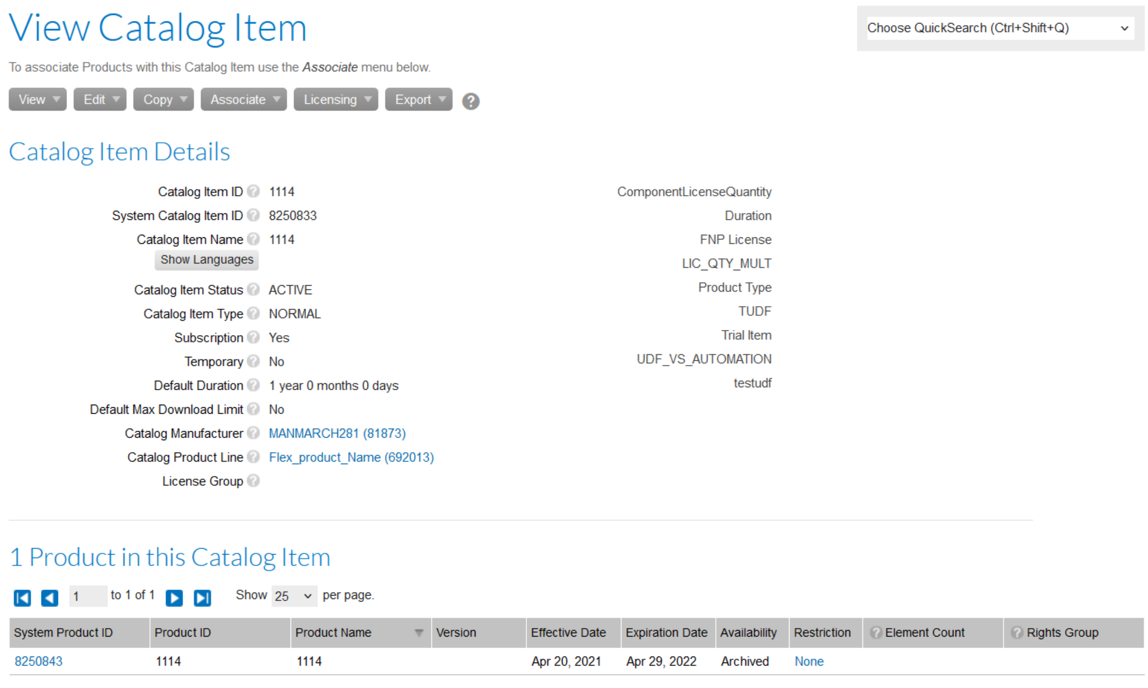


2. Enter the required data in the **Catalog Item Name** or **Catalog Item ID** box and click on the **Search** button. A list of Catalog Items matching the search criteria are listed.

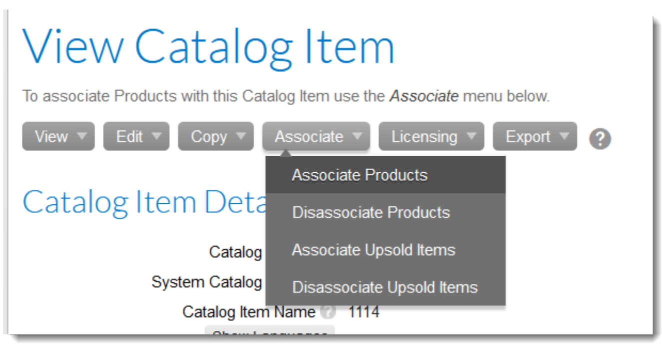


System Catalog Item ID	Catalog Item ID	Catalog Item Name	Catalog Manufacturer	Catalog Product Line	Catalog Item Status	# of Associated Products	License Group
8250833	1114	1114	MANMARCH281	Flex_product_Name	ACTIVE	1	
8250853	1115	1115	Manufacturer for Common License Issuers	PLNE_FNP	ACTIVE	1	
5331433	1234	1234	1234567891123456789212345678931234567894123456789512345678961234567897123456789812345678991234567100	CVSPL	ACTIVE	4	
8246183	1	dh	QAAUTOManufacturer	ProductLine01-QA-ProductLineName	ACTIVE	2	
8273353	1234987651456	PrintBuddy	ASM	PLNE-FNE	ACTIVE	0	

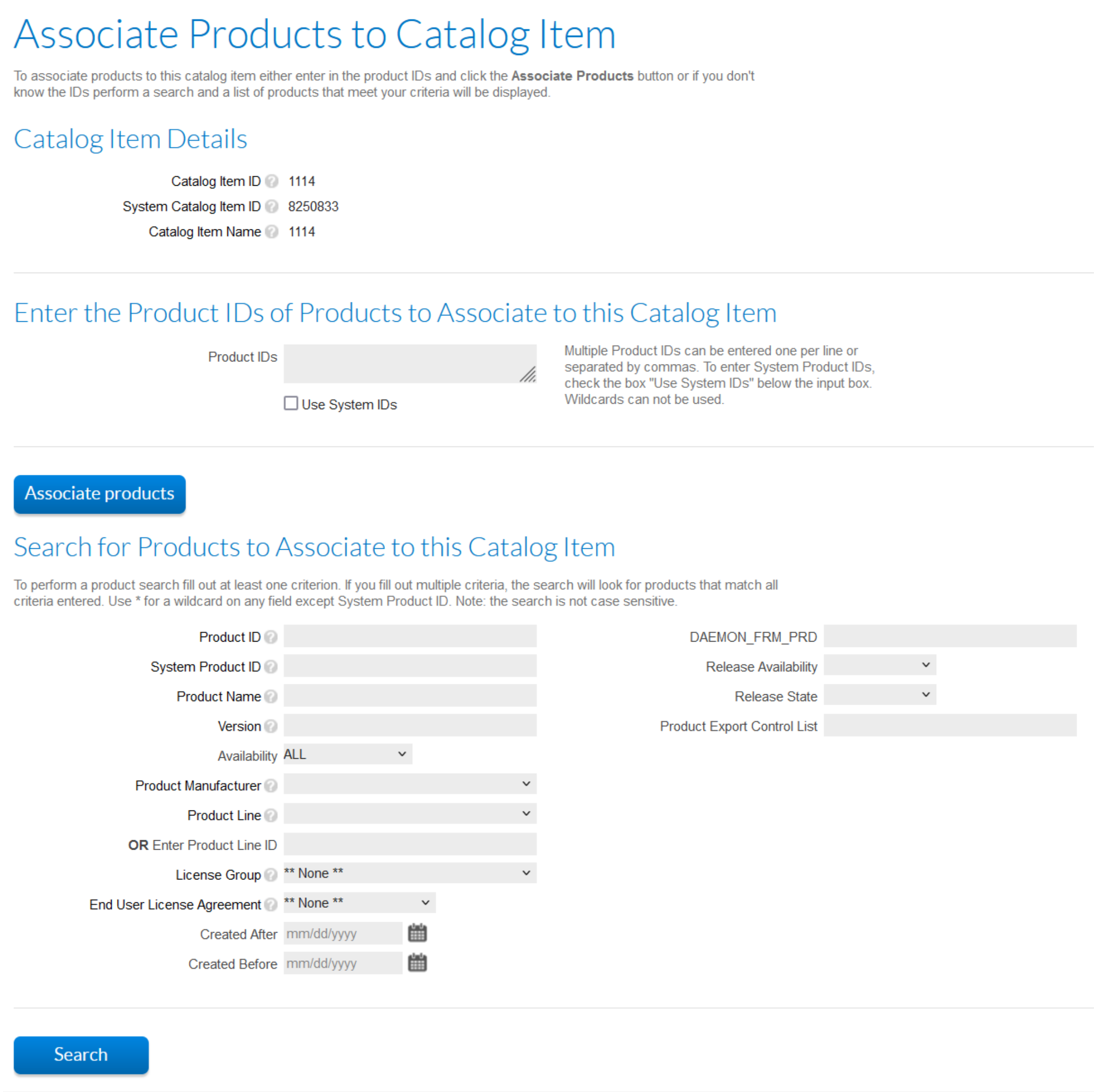
3. Click on a **System Catalog Item ID** of the item you want to view. The **View Catalog Item** page for that item opens.



4. Click on the **Associate** button and select **Associate Products**.

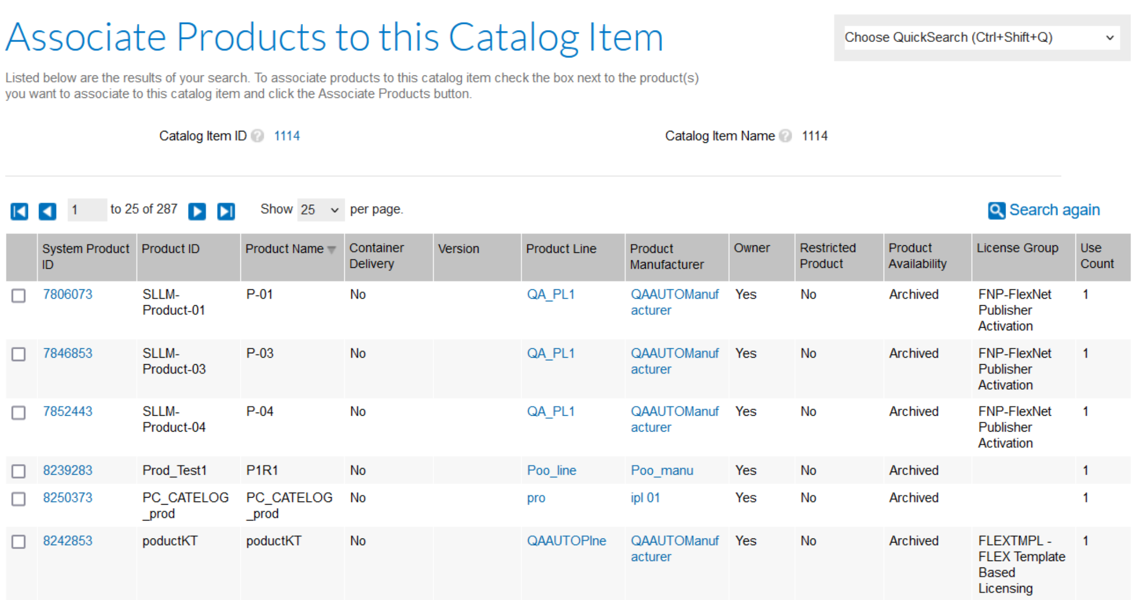


The **Associate Products to Catalog Item** page opens.



5. There are following two ways to associate Products to Catalog Items:

    - If you know the exact ID of the Product you want associated, then enter it here and click on the **Associate products** button.
    - If you don’t know the exact ID of the Product you want associated, you can search for it on the lower half of the screen. Enter search criteria and click the **Search** button. A list of products matching the criteria is listed on the **Associate Products to this Catalog Item** page.



	System Product ID	Product ID	Product Name	Container Delivery	Version	Product Line	Product Manufacturer	Owner	Restricted Product	Product Availability	License Group	Use Count
☐	7806073	SLLM-Product-01	P-01	No		QA_PL1	QAAUTOManufacturer	Yes	No	Archived	FNP-FlexNet Publisher Activation	1
☐	7846853	SLLM-Product-03	P-03	No		QA_PL1	QAAUTOManufacturer	Yes	No	Archived	FNP-FlexNet Publisher Activation	1
☐	7852443	SLLM-Product-04	P-04	No		QA_PL1	QAAUTOManufacturer	Yes	No	Archived	FNP-FlexNet Publisher Activation	1
☐	8239283	Prod_Test1	P1R1	No		Poo_line	Poo_manu	Yes	No	Archived		1
☐	8250373	PC_CATELOG_prod	PC_CATELOG_prod	No		pro	ipl 01	Yes	No	Archived		1
☐	8242853	poductKT	poductKT	No		QAAUTOPlne	QAAUTOManufacturer	Yes	No	Archived	FLEXTMPL - FLEX Template Based Licensing	1

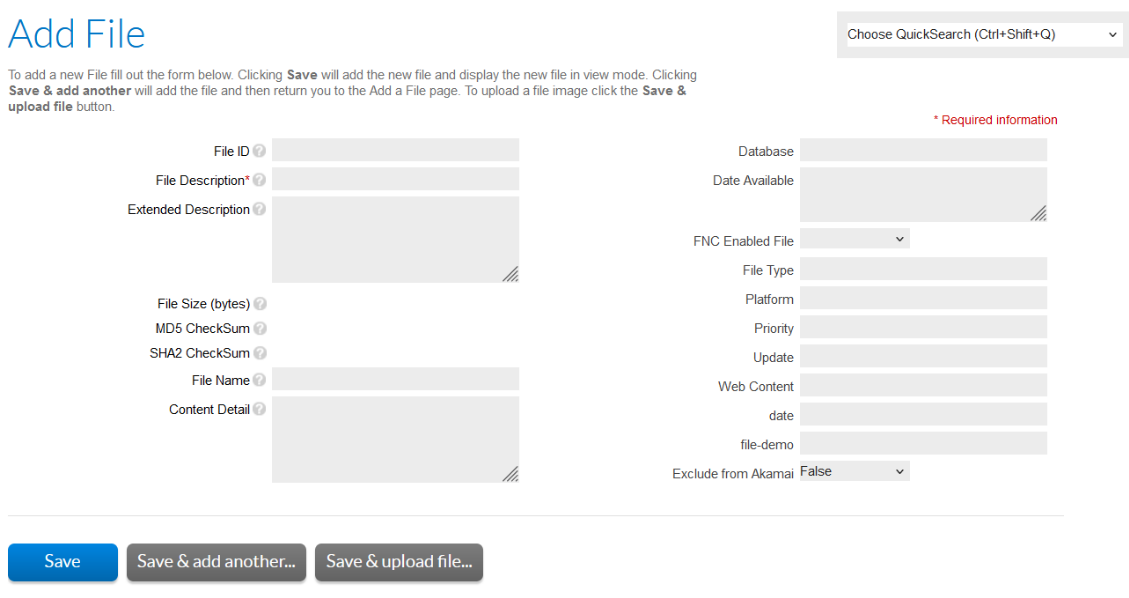
6. Once you have found the Products you wish to associate, click the check box next to the product name and then click the **Associate products** button below the listing.

Step 8: Add Files

Files need to have a File ID placeholder in the database to attach the binary image to. Files also need to exist before you can associate them to Products.

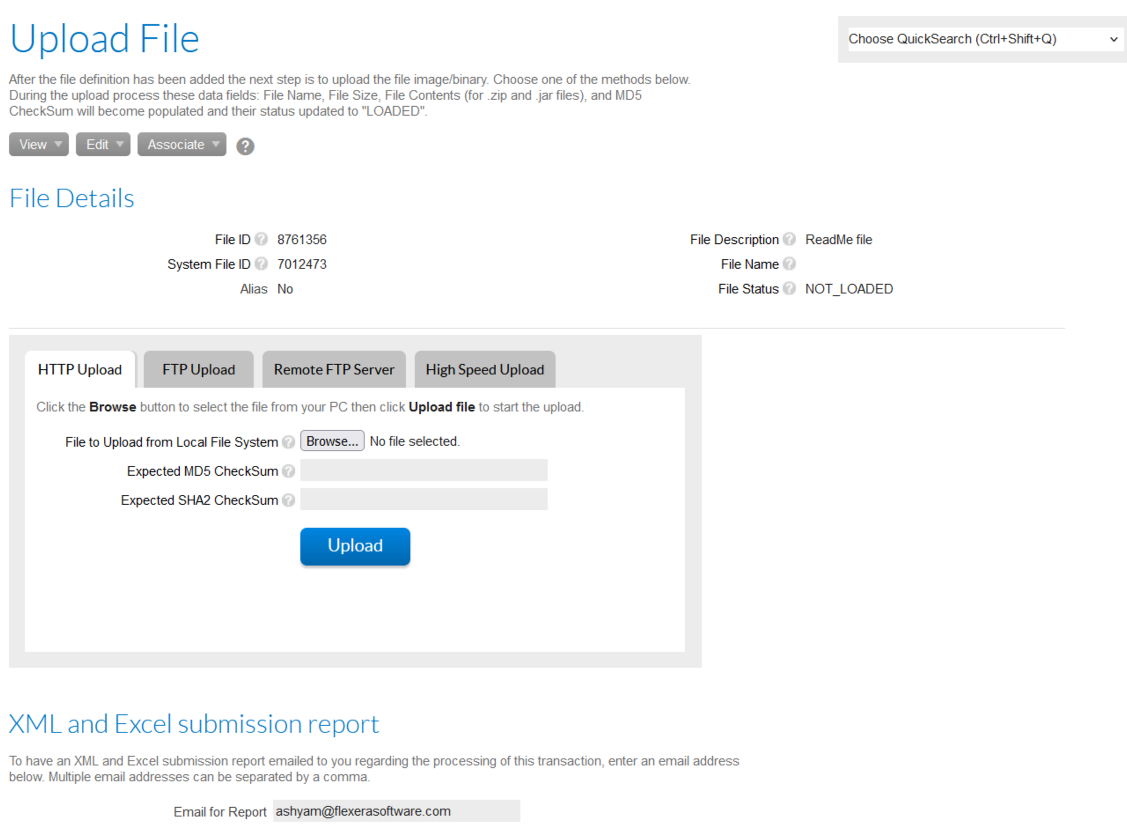
Task ***To add files:***

1. On the **Package Products** menu, click **Add File**. The **Add File** page opens.



2. Enter the required data in the **File Description** field, which will be displayed to the end user next to a **download** button. The **File ID** field is optional to enter the data, but highly recommended for product management uses. The **File Name** field is optional at this stage – it will be populated when the actual image is loaded from your file system.

3. Click the **Save & upload file ...** button. The **Upload File** page opens.



There are four methods for uploading files:

- **HTTP Upload**—File images residing at a location local to the end user's machine can be uploaded via the browser. This is the simplest and most direct method to upload smaller sized files. Continue with Step 4. For more information, see HTTP Upload.
- **FTP Upload**—File images previously loaded to the Revenera FTP upload server can be uploaded. Skip to Step 5. For more information, see FTP Upload.
- **Remote FTP Server**—File images located on a remote non-Revenera FTP Server can be uploaded. Skip to Step 6. For more information, see Remote FTP Server.
- **High Speed Upload**—This is the optimized method to upload larger sized files. This method requires the installation of the high speed plug-in. Skip to Step 7. For more information, see High Speed Upload.

4. To use the **HTTP Upload** option, perform the following steps:
    a. Open the **HTTP Upload** tab.
    b. Click on the **Browse...** button and choose the file.
    c. Click on the **Upload** button.
    d. Wait for the file to upload.
5. To use the **FTP Upload** option, perform the following steps:
    a. Open the **FTP Upload** tab.

b. Click the **Browse** button and select the file you want to upload.

c. Enter the **Expected MD5 CheckSum** value.

Note ▪ *The expected value of the MD5 CheckSum utility should be a 32 character hexadecimal value. When you enter a value in this field, the Upload File process will check that the file it received has the same CheckSum as the value you enter here. It enables additional quality control during the File Upload process.*

d. Enter the **Expected SHA2 CheckSum** value (if applicable).

Note ▪ *The expected value of the SHA2 CheckSum utility should be a 64 character hexadecimal value. When you enter a value in this field, the Upload File process will check that the File it received has the same CheckSum as the value you enter here. It enables additional quality control during the File Upload process.*

e. Click **Upload File from Flexera Software FTP Server**.

6. To use the **Remote FTP Server** option, perform the following steps:

a. Open the **Remote FTP Server** tab.

b. Enter the **FTP Hostname** of your FTP server.

c. Enter the **FTP Username** and **FTP Password** of your FTP server.

d. Enter the full path to the file in the **Path and Filename** field.

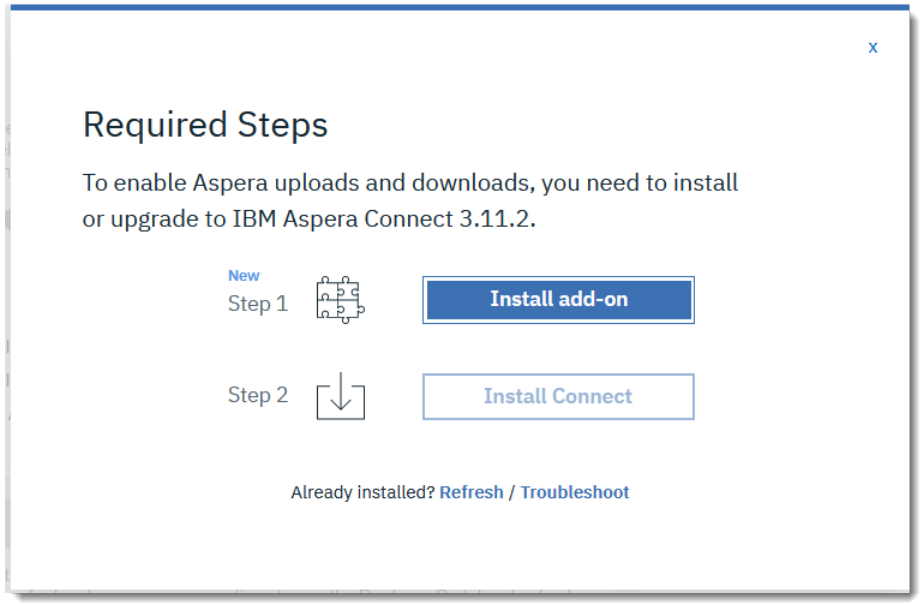
e. Enter the **Expected MD5 CheckSum** value.

Note ▪ *The expected value of the MD5 CheckSum utility should be a 32 character hexadecimal value. When you enter a value in this field, the Upload File process will check that the File it received has the same CheckSum as the value you enter here. It enables additional quality control during the File Upload process.*

f. Click **Upload**.

7. To use the **High Speed Upload** option, perform the following steps:

a. When you open the **High Speed Upload** tab, you are prompted to install the plug-in by clicking **Install add-on**.



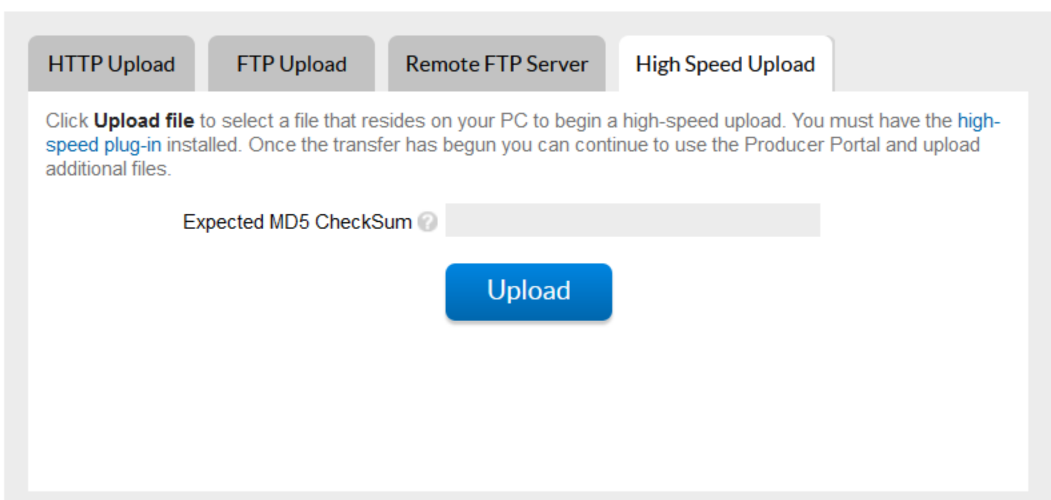
b. Click **Install add-on** to install the plug-in.

c. Next, click on the **High-Speed Upload** tab again. You are prompted to proceed with **Step 2, Install Connect**.

d. Click **Install Connect**. A file is downloaded.

e. Install the downloaded file. The **Activity - IBM Aspera Connect** dialog box opens.

f. Return to the **High Speed Upload** tab:



g. Enter the **Expected MD5 CheckSum**.

Note ▪ *The expected value of the MD5 CheckSum utility should be a 32 character hexadecimal value. When you enter a value in this field, the Upload File process will check that the File it received has the* *same CheckSum as the value you enter here. It enables additional quality control during the File Upload process.*

h. Initiate the High Speed Upload for your file by clicking on the **Upload** button and choosing the file.

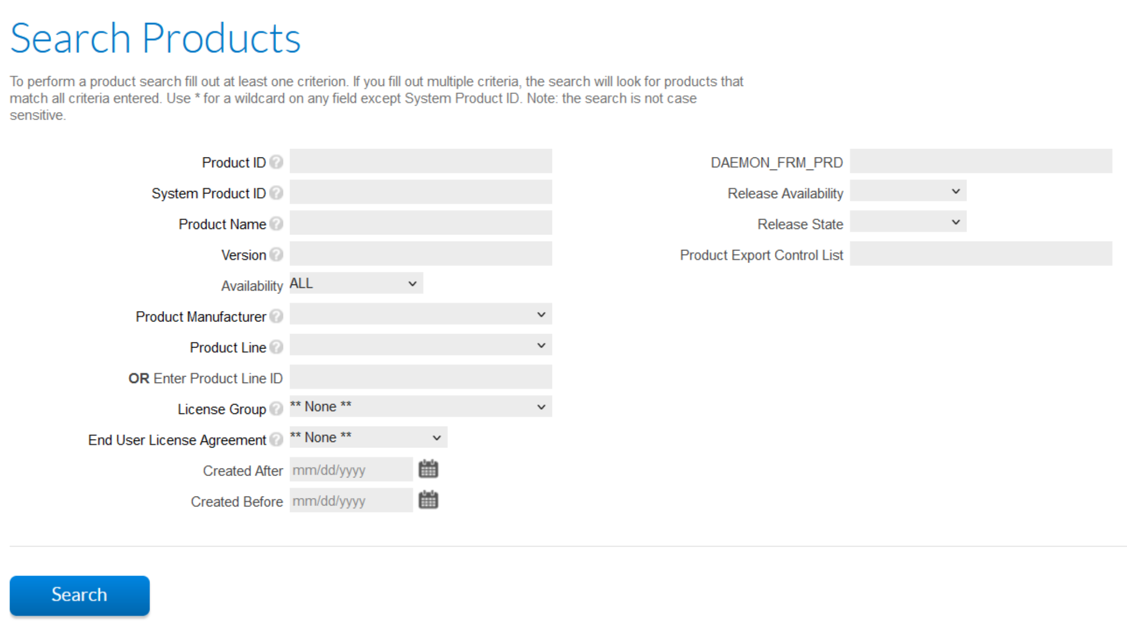
i. You can monitor the file transfer status in the **Activity - IBM Aspera Connect** dialog box while you proceed to other functions using your browser.

Step 9: Associating Files to Products

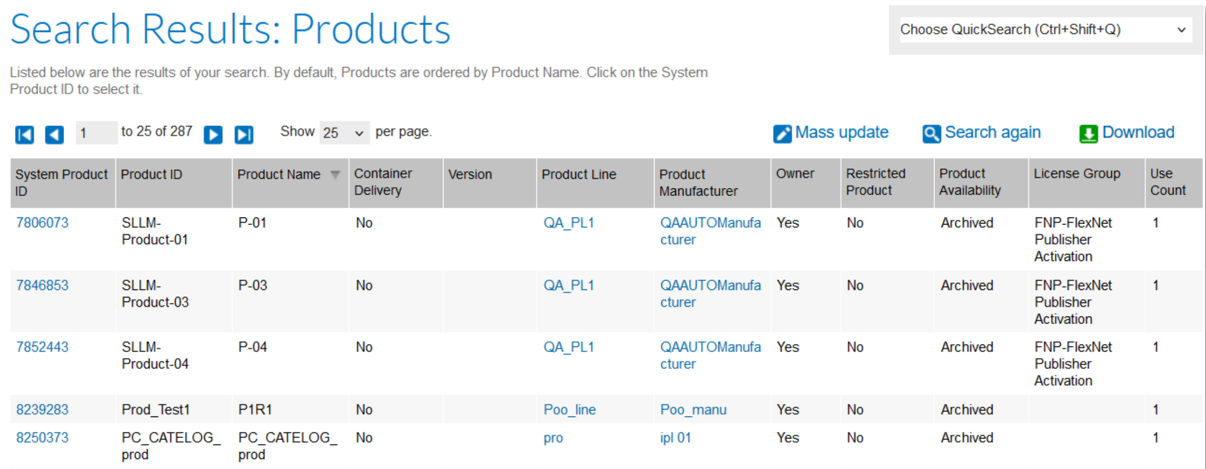
If you need to manually associate Files to Products after they are created, you can do so by performing the following steps. Otherwise, if you followed the gray-box workflow button for a 1-to-1 mapping, this will be done automatically for you.

Task ***To associate Files to products:***

1. On the **Package Products** menu, click **Search Producs**. The **Search Products** page opens.



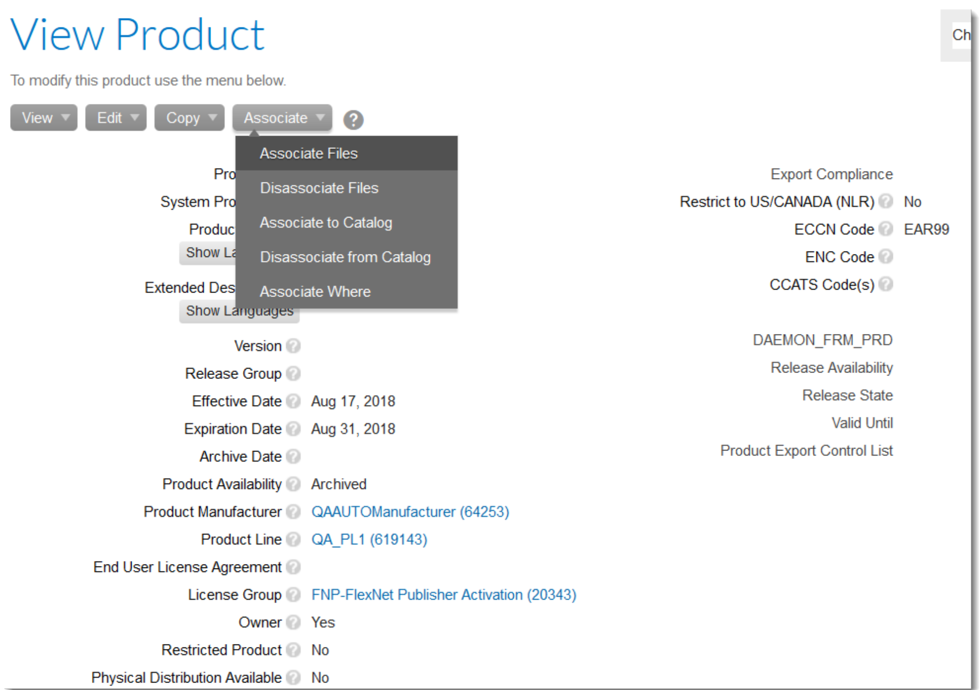
2. Enter the required data in the **Product Name** or **Product ID** field, and click on the **Search** button. A list of products is returned.



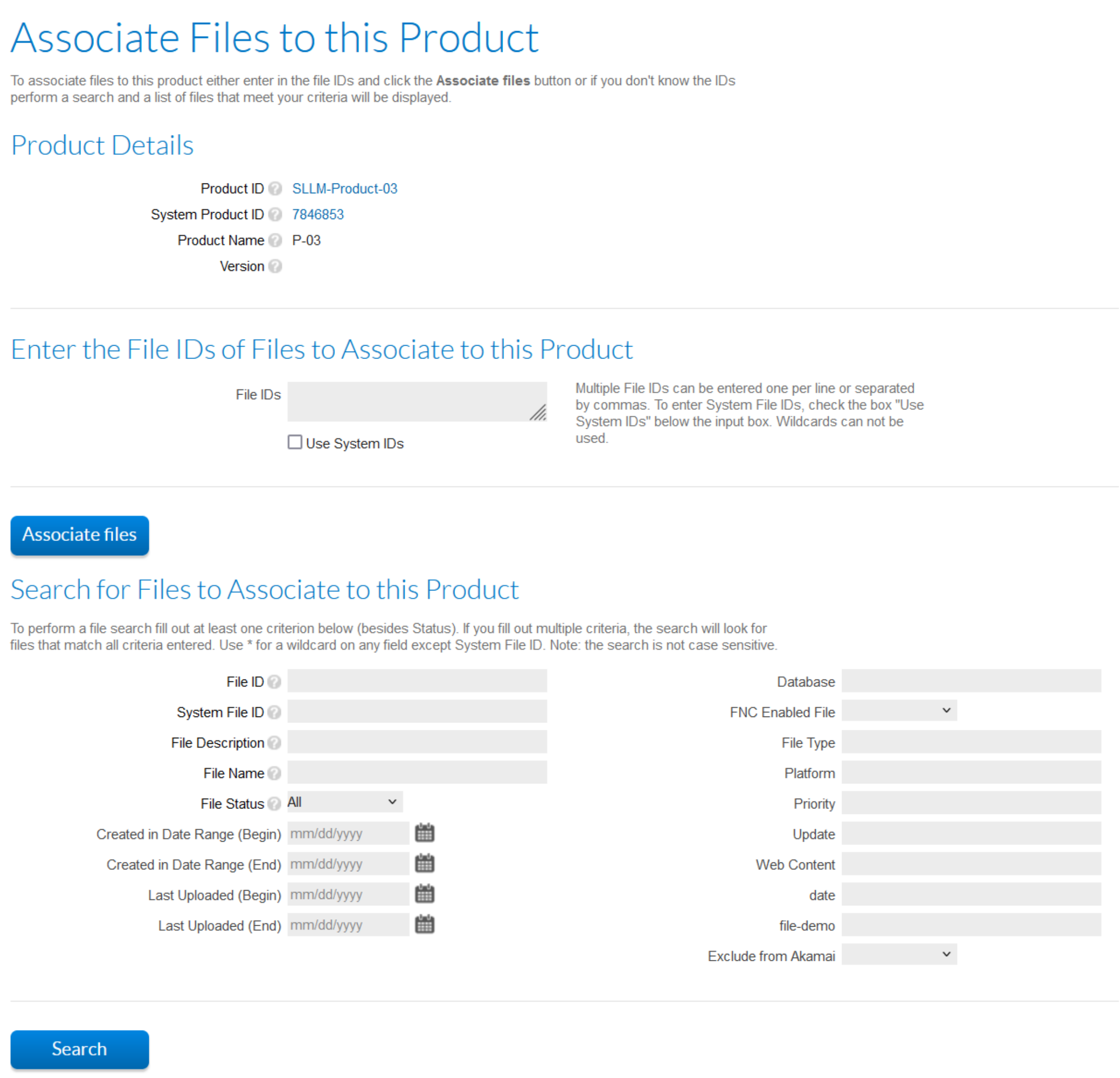
System Product ID	Product ID	Product Name	Container Delivery	Version	Product Line	Product Manufacturer	Owner	Restricted Product	Product Availability	License Group	Use Count
7806073	SLLM-Product-01	P-01	No		QA_PL1	QAAUTOManufacturer	Yes	No	Archived	FNP-FlexNet Publisher Activation	1
7846853	SLLM-Product-03	P-03	No		QA_PL1	QAAUTOManufacturer	Yes	No	Archived	FNP-FlexNet Publisher Activation	1
7852443	SLLM-Product-04	P-04	No		QA_PL1	QAAUTOManufacturer	Yes	No	Archived	FNP-FlexNet Publisher Activation	1
8239283	Prod_Test1	P1R1	No		Poo_line	Poo_manu	Yes	No	Archived		1
8250373	PC_CATELOG_prod	PC_CATELOG_prod	No		pro	ipl 01	Yes	No	Archived		1

3. Click on the **System Product ID** of the product you want to associate files to. The **View Product** page opens.

4. Click on the **Associate** button and select **Associate Files**.



The **Associate Files to this Product** page opens.



5. There are the following ways to associate Files to Products:

- If you know the exact ID of the File you want associated, then enter it in the **File IDs** box and click **Associate files**.
- If you don't know the exact ID of the File you want associated, you can search for it on the lower half of the **Associate Files to this Product** page. Enter search criteria and click the **Search** button. A list of files is returned. Once you have found the Files you wish to associate, click the check box next to the **System File ID** of the files you want to associate and then click the **Associate files** button below the listing.

Email

This section provides an overview of how email is used in FlexNet Operations LLM Producer Portal and how to edit email templates.

- Email Overview

- Editing Email Templates
- Localization of Email Templates
- Setting Up Variations of Email Templates

Email Overview

Email is sent to Members based on FlexNet Operations LLM events.

The following are the common events:

- New Member added (which sends the Welcome Email)
- New Entitlement created (which sends the Order Email)
- Software Update Available (which sends the Update Notification Email)

The FlexNet Operations LLM Producer Portal application allows you to change the templates that are used by the FlexNet Operations LLM application to send email to the end user, your customer. Email templates are listed on the **Administer > List Email Templates** page.

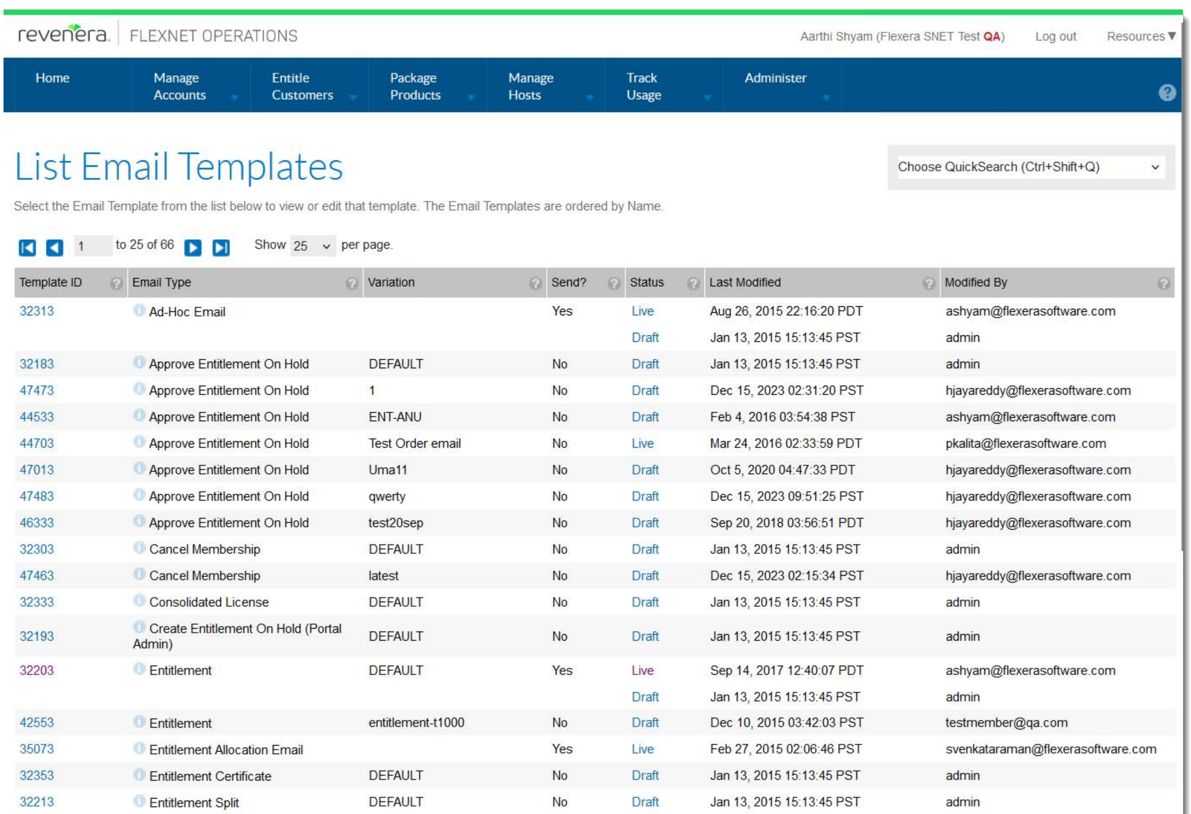


Figure 2-13: List Email Templates Page

FlexNet Operations LLM Producer Portal offers you flexibility in editing your Email Templates. You can create the new text in draft mode and then print it for approval. In the mean time, your template is saved in a **Draft** status. If you want to go back to a previous version, you can look in your archived versions and change it into the **Live** version again.

Email Status Values

Email Templates can be in one of the following three statuses:

- **Live**—This template is used by the application to send out an email. There can only be one Live template at a time.
- **Draft**—This template is in progress. Changes have been made but it is not ready to be used as the live template yet. There can only be one Draft template at a time.
- **Archived**—These templates were once Live but have been replaced by newer versions. The system will archive your older versions of the template for you.

Send? Column

Whether or not the application will attempt to send the email is specified by the value in the **Send?** column:

- **Yes**—Send the email.
- **No**—Do not send the email.

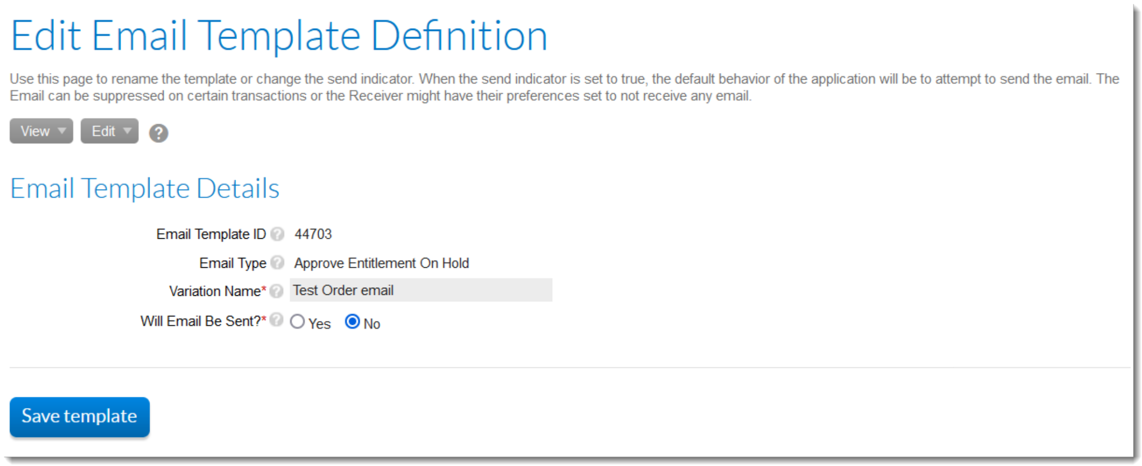
Note ▪ *Email templates have to have a **Status** of **Live** and the **Send?** option set to **Yes** in order for emails to be sent.*

Important ▪ *The UAT instance of FlexNet Operations Producer Portal does not send out any emails other than password finders, so emails will only be queued even if the email template has a **Status** of **Live** and the **Send?** option is set to **Yes**.*

You can change this value (provided you have the correct application permissions).

Task ***To edit the Send? option:***

1. On the **List Email Templates** page, click on the **Template ID** of the email template you want to edit. The **View Live/Draft Email Template** page opens.
2. Click **Edit > Edit Definition**. The **Edit Email Template Definition** page for that email template opens.



3. Set the **Will Email Be Sent?** field to either **Yes** or **No**.

4. Click **Save template**.

Editing Email Templates

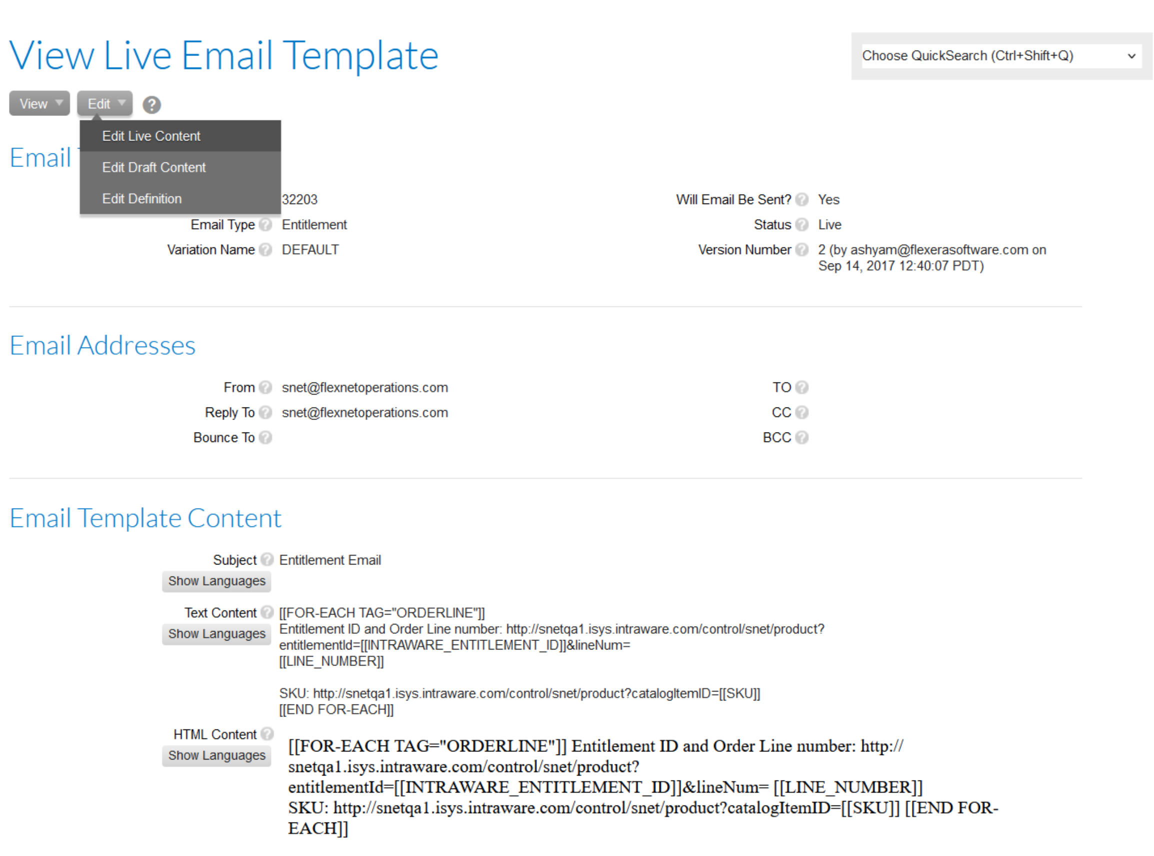
To edit an email template, perform the following steps.

Task ***To edit an Email Template:***

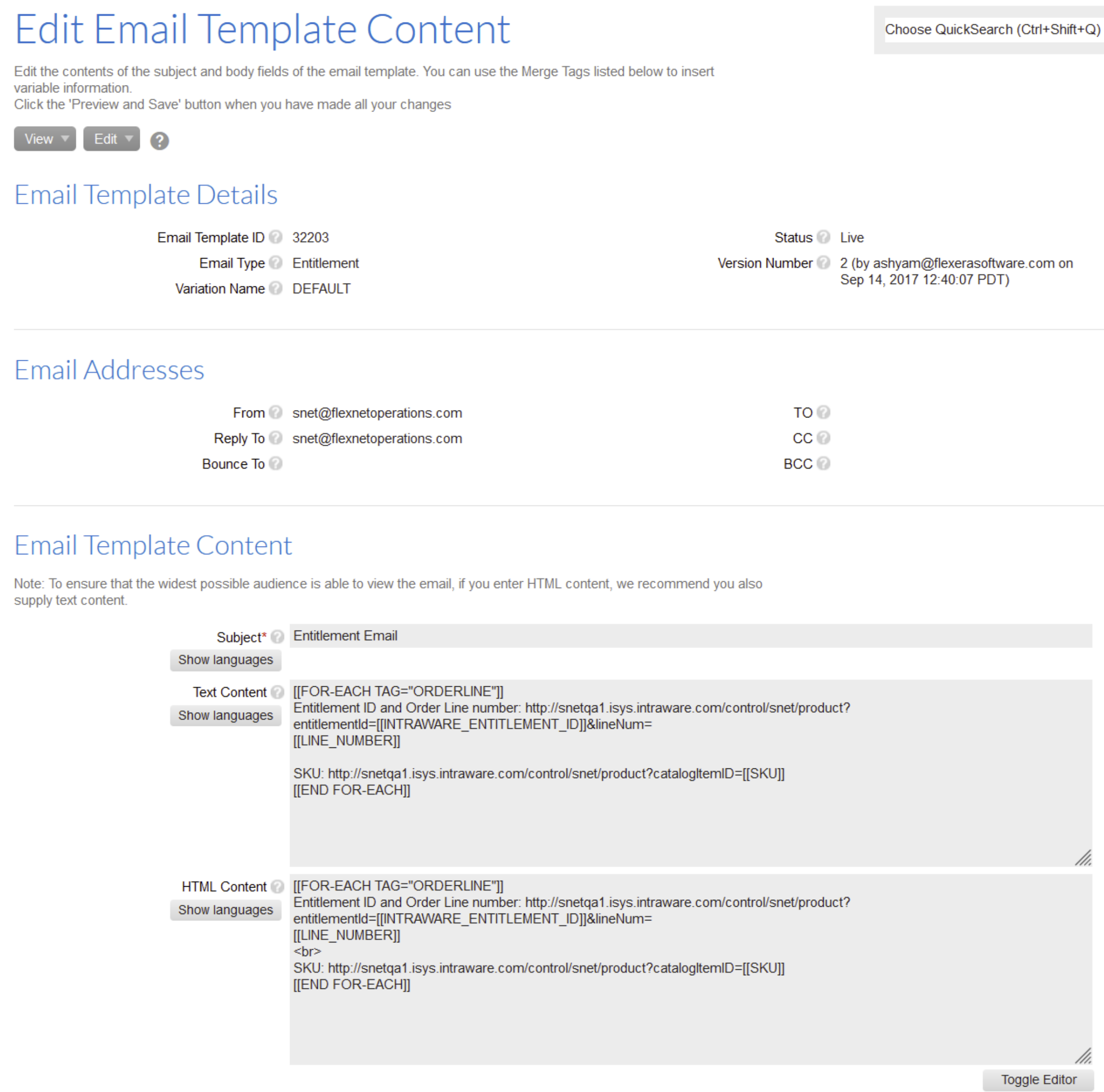
1. On the **Administer** menu, click **List Email Templates**. The **List Email Templates** page opens.

2. Choose the Email Template you wish to edit by clicking on the Email **Template ID**. The **View Live Email Template** page opens.

3. Click on the **Edit** button and select **Edit Live Content** or **Edit Draft Content**.



The content of the email template is displayed:



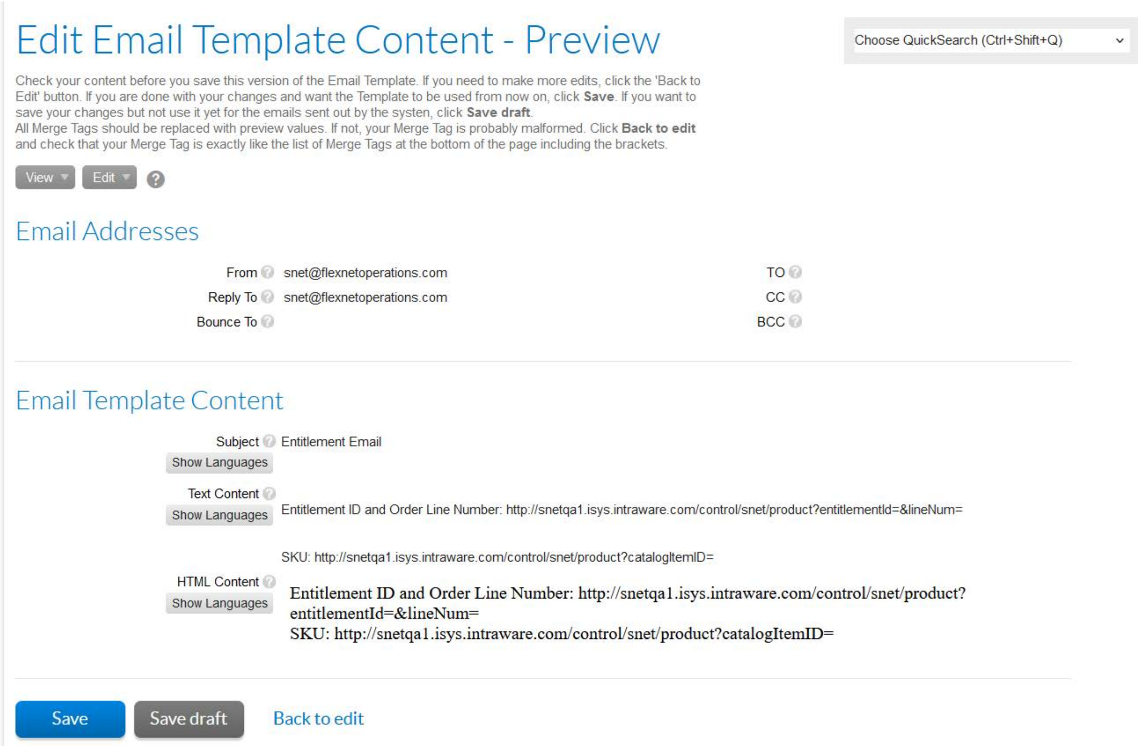
***Note** ▪ Only the **Live Template** will be used to send emails to customers.*

4. Edit the Template by inserting content into the available text boxes.

Note ▪ Emails can be created as text and HTML, and we recommend using both.

5. You can choose from the list of available merge tags in the **Merge Tag List** at the bottom of the page to draw in specific data at the time the email is actually generated. This list will vary depending on the Email Template and the type of data available to it.

6. When you have modified your Email Template, click the **Preview & save** button. The **Edit Email Template Content - Preview** page opens displaying a preview of the email template.



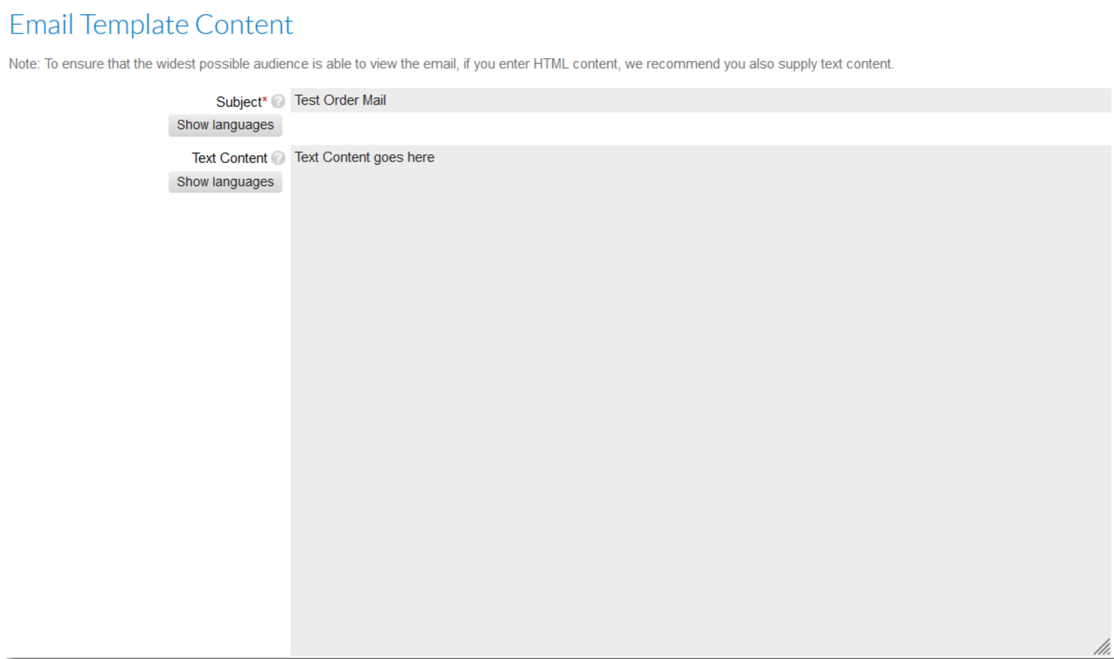
7. Click the **Save** button to save it as a Live Email Template, or click the **Save draft** button to save it in Draft mode. If you wish to continue editing the Email Template, click on the **Back to edit** button.

Localization of Email Templates

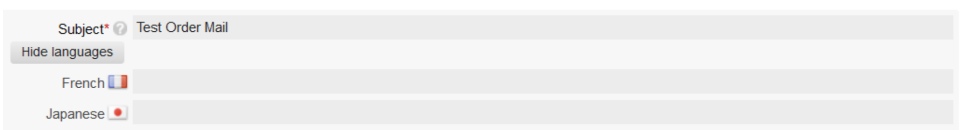
You can localize email templates into multiple languages. However, this option needs to be enabled during implementation.

Task ***To localize the content of an email template:***

1. On the **Administer** menu, click **List Email Templates**. The **List Email Templates** page opens.
2. Choose the Email Template you wish to edit by clicking on the Email **Template ID**. The **View Live/Draft Email Template** page opens.
3. Click **Edit > Edit Live/Draft Content**. Next to each text field, a **Show languages** button is displayed.



4. Click the **Show languages** button. Additional text fields for the specified languages are listed and the button is renamed to **Hide languages**.



5. Enter localized content in the language text fields and click **Preview & save**.

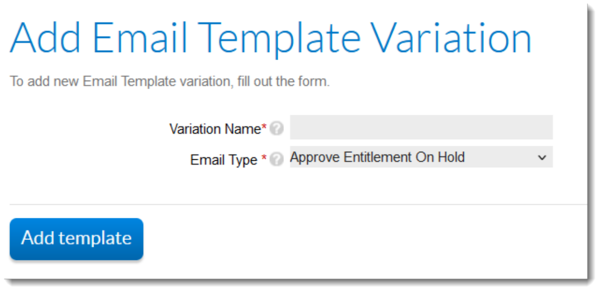
Note ▪ *For more information, see Localized Emails.*

Setting Up Variations of Email Templates

You can define multiple variations of each email template. If you define multiple variations, the users are given the option to select from available template alternatives when sending an email.

Task ***To specify an email template variation:***

1. Select **Administer > Add Email Template**. The **Add Email Template Variation** page opens.

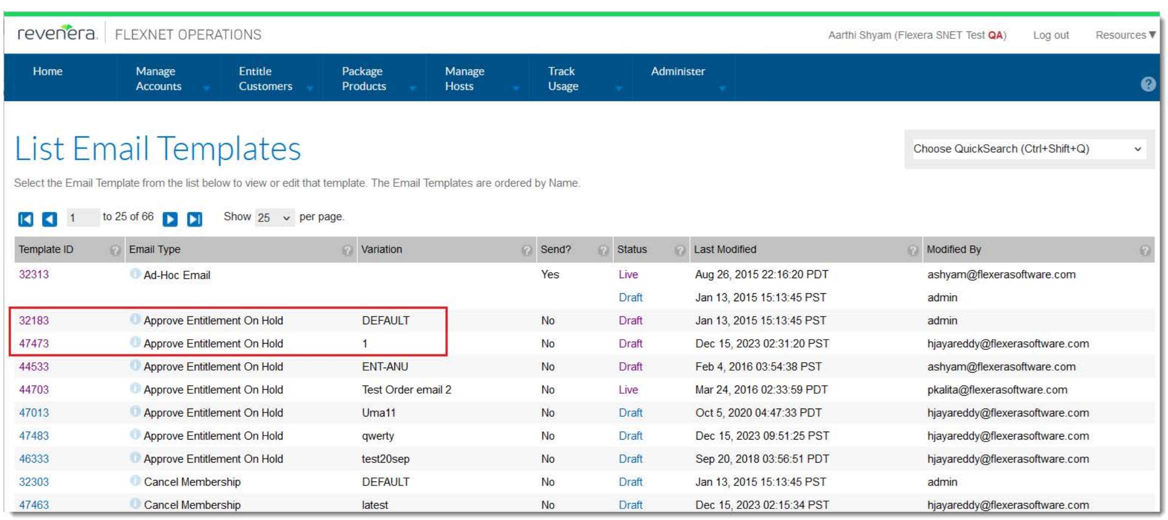


2. From the **Email Type** list, select the type you want to create an alternate email template for.

Note ▪ *This step assumes that a default version of that* ***Email Type*** *already exists. The first email template that is created for this* ***Email Type*** *was assigned the name* ***DEFAULT*** *in the* ***Variation Name*** *field.*

3. In the **Variation Name** field, enter a reference for an alternate email template. This value can be up to 25 characters and is displayed to users who have the option to select from available template alternatives when sending an email.

4. Click **Save template**. This email template will now be listed on the **List Email Templates** page with a different **Template ID** than the default version of this **Email Type** template, and with the **Variation Name** that you entered listed in the **Variation** column.



Template ID	Email Type	Variation	Send?	Status	Last Modified	Modified By
32313	Ad-Hoc Email		Yes	Live	Aug 26, 2015 22:16:20 PDT	ashyam@flexerasoftware.com
				Draft	Jan 13, 2015 15:13:45 PST	admin
32183	Approve Entitlement On Hold	DEFAULT	No	Draft	Jan 13, 2015 15:13:45 PST	admin
47473	Approve Entitlement On Hold	1	No	Draft	Dec 15, 2023 02:31:20 PST	hjayareddy@flexerasoftware.com
44533	Approve Entitlement On Hold	ENT-ANU	No	Draft	Feb 4, 2016 03:54:38 PST	ashyam@flexerasoftware.com
44703	Approve Entitlement On Hold	Test Order email 2	No	Live	Mar 24, 2016 02:33:59 PDT	pkalita@flexerasoftware.com
47013	Approve Entitlement On Hold	Uma11	No	Draft	Oct 5, 2020 04:47:33 PDT	hjayareddy@flexerasoftware.com
47483	Approve Entitlement On Hold	qwerty	No	Draft	Dec 15, 2023 09:51:25 PST	hjayareddy@flexerasoftware.com
46333	Approve Entitlement On Hold	test20sep	No	Draft	Sep 20, 2018 03:56:51 PDT	hjayareddy@flexerasoftware.com
32303	Cancel Membership	DEFAULT	No	Draft	Jan 13, 2015 15:13:45 PST	admin
47463	Cancel Membership	latest	No	Draft	Dec 15, 2023 02:15:34 PST	hjayareddy@flexerasoftware.com

Entitlements

This section describes how entitlements are used in FlexNet Operations LLM Producer Portal and how to create customer entitlements.

- Overview of Entitlements
- Entitling Customers

Overview of Entitlements

An Entitlement in FlexNet Operations LLM is a representation of which software deliverables should be granted to which Account. The Entitlement includes the Catalog Item and the duration of time for which access to it should last. It can also be referred to as an order. The following represents the work flow pertaining to Entitlement in FlexNet Operations LLM:

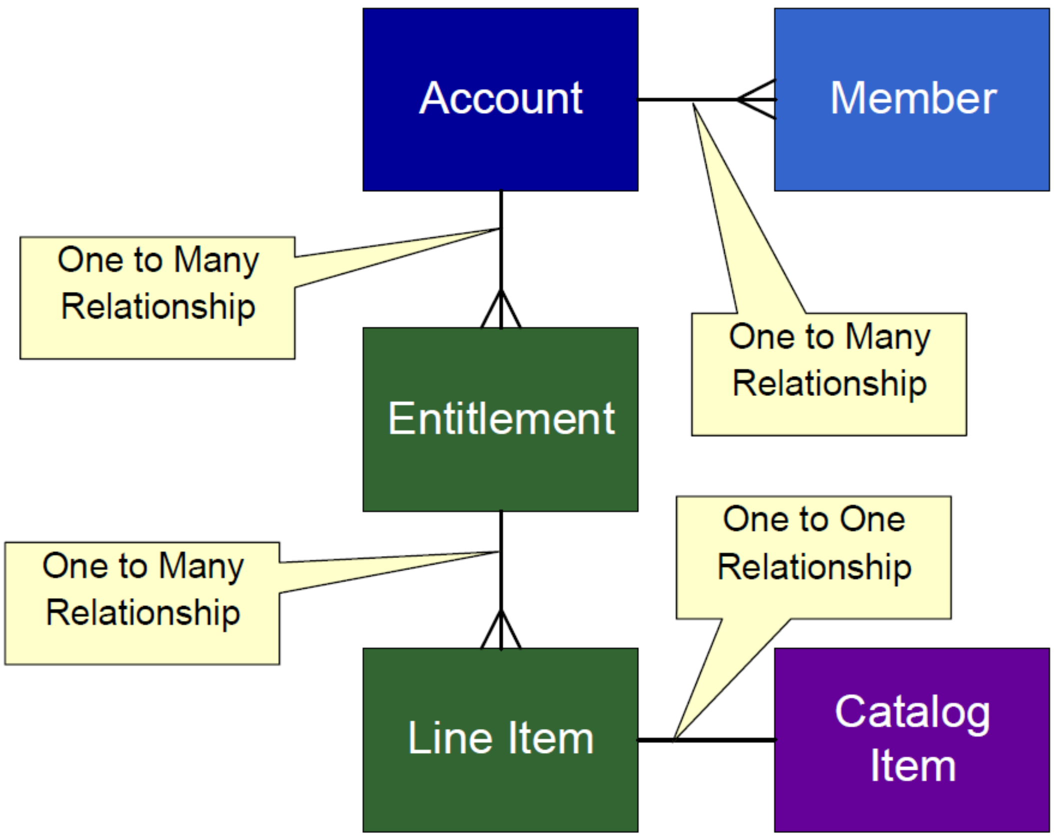


Figure 2-14: Entitlement Workflow in FlexNet Operations

Account Concepts

Accounts are customers who you sell to or are licensed to access the product.

- Examples include companies, sites, departments or divisions.
- Accounts are entitled to software, and all Members associated with an account have the same access.
- An Account needs to have one or more Members associated with it.
- At least one Member must exist in order for someone at the company to have access the site.

Member Concepts

Members are end users.

- A Member’s e-mail address is their username, and FlexNet Operations LLM generates a password. Username and password are sent via the Welcome Email.
- Software access for a Member is controlled by which Account they are on.
- The Member’s physical address is used for export compliance.

Entitlement Concepts

Frequently, Entitlements are order driven. Entitlements can also be thought of as a way of grouping Line Items.

Entitlement header information shows up on the Order History page, and can be sent in an Order Notification email.

Line Item Concepts

Line Items specify the Catalog Item to grant an Account access to.

- Line Items have Effective and Expiration dates and typically map to maintenance contracts.
- The end user view of specific Product versions is determined by how Line Item dates overlap with Product effective dates that are associated with the entitled Catalog Item.

Entitling Customers

This section describes the following scenarios for entitling customers:

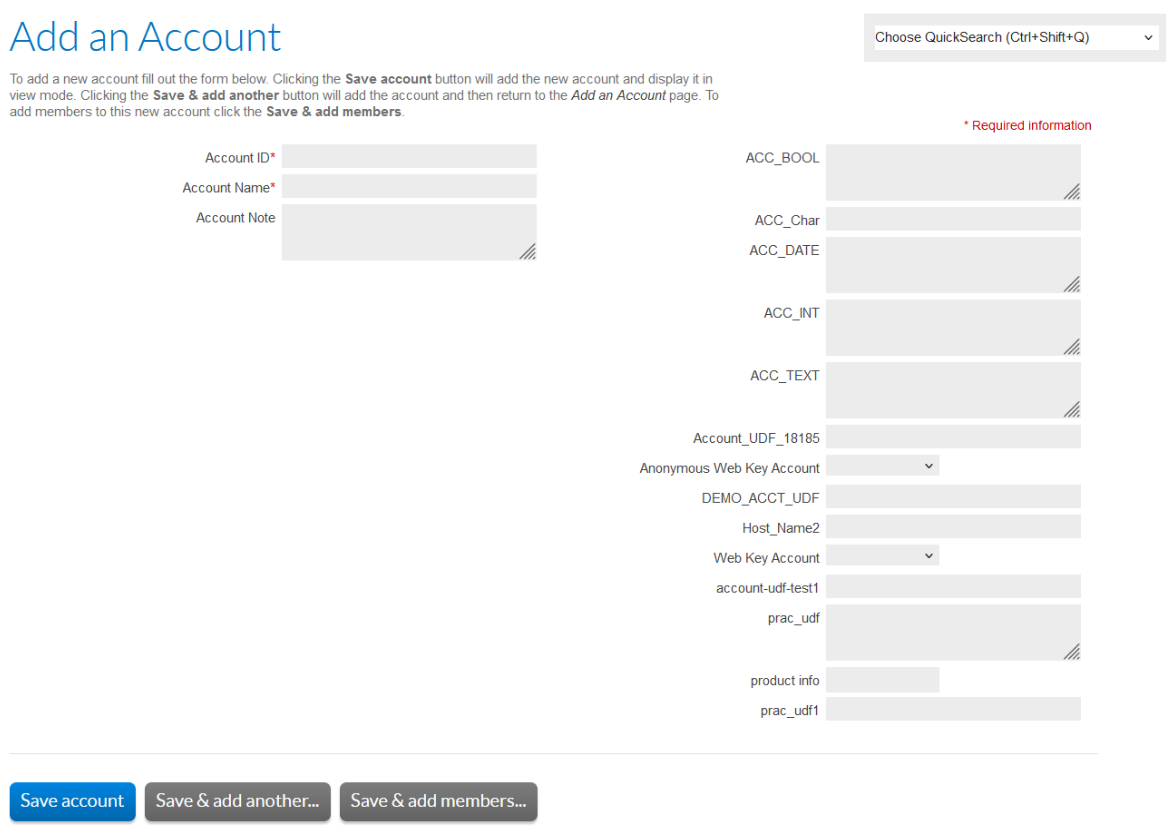
- Creating and Entitling New Customers
- Entitling an Existing Customer Account

Creating and Entitling New Customers

To create and entitle new customers, perform the following steps.

Task ***To entitle a new customer:***

1. On the **Manage Accounts** menu, click **Add Account**. The **Add an Account** page opens.

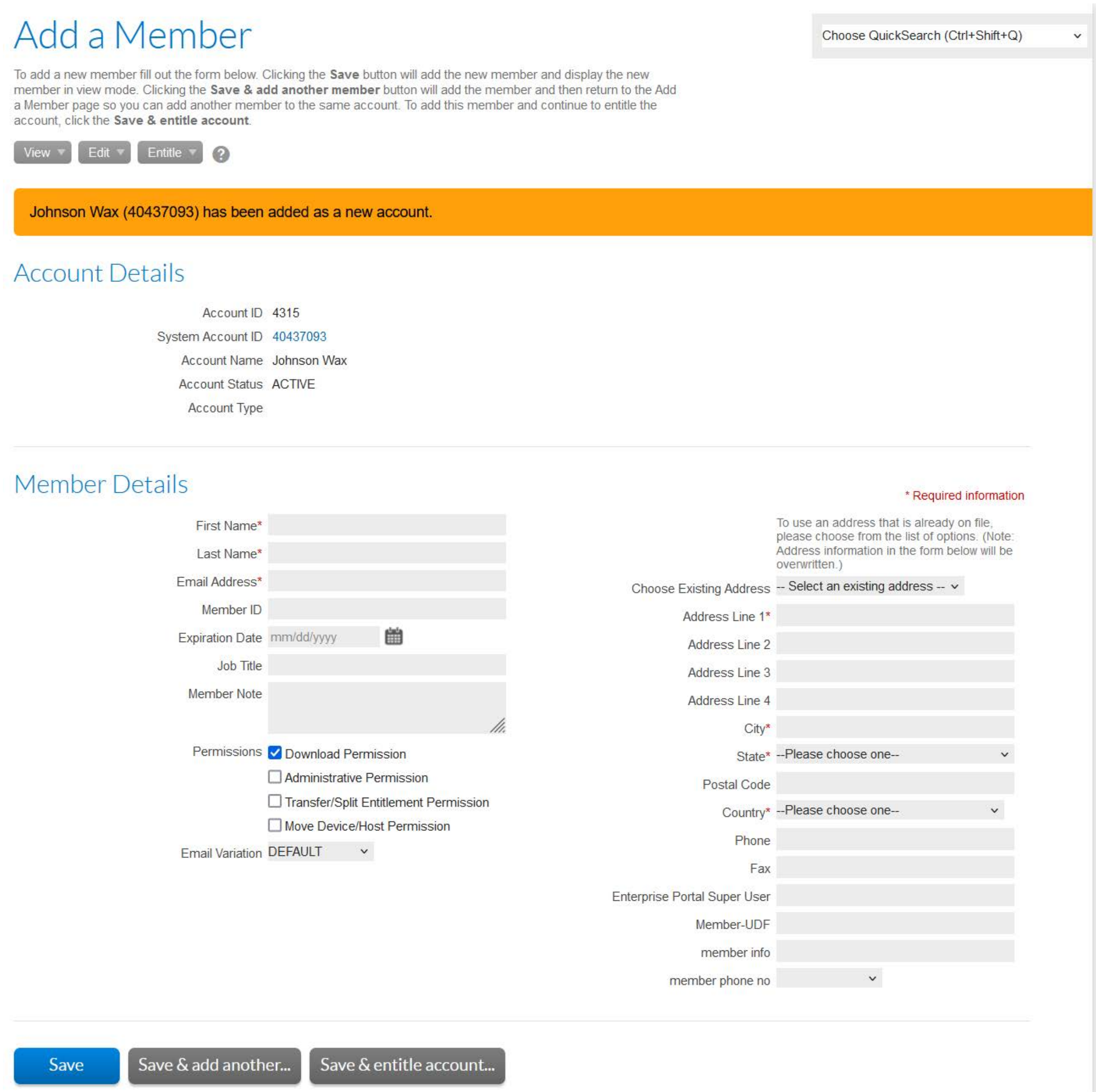


2. Enter the required details in the **Account ID***, **Account Name***, and **Account Note** box,

__Note__ ▪ Consider the following while entering the required data:

- *Customer ID or other unique ID is entered in the **Account ID** field.*
- *Company name is entered in the **Account Name** field.*
- *Description is entered in the **Account Note** field, which is also optional.*

3. Click **Save & add members...** The **Add A Member** page opens.

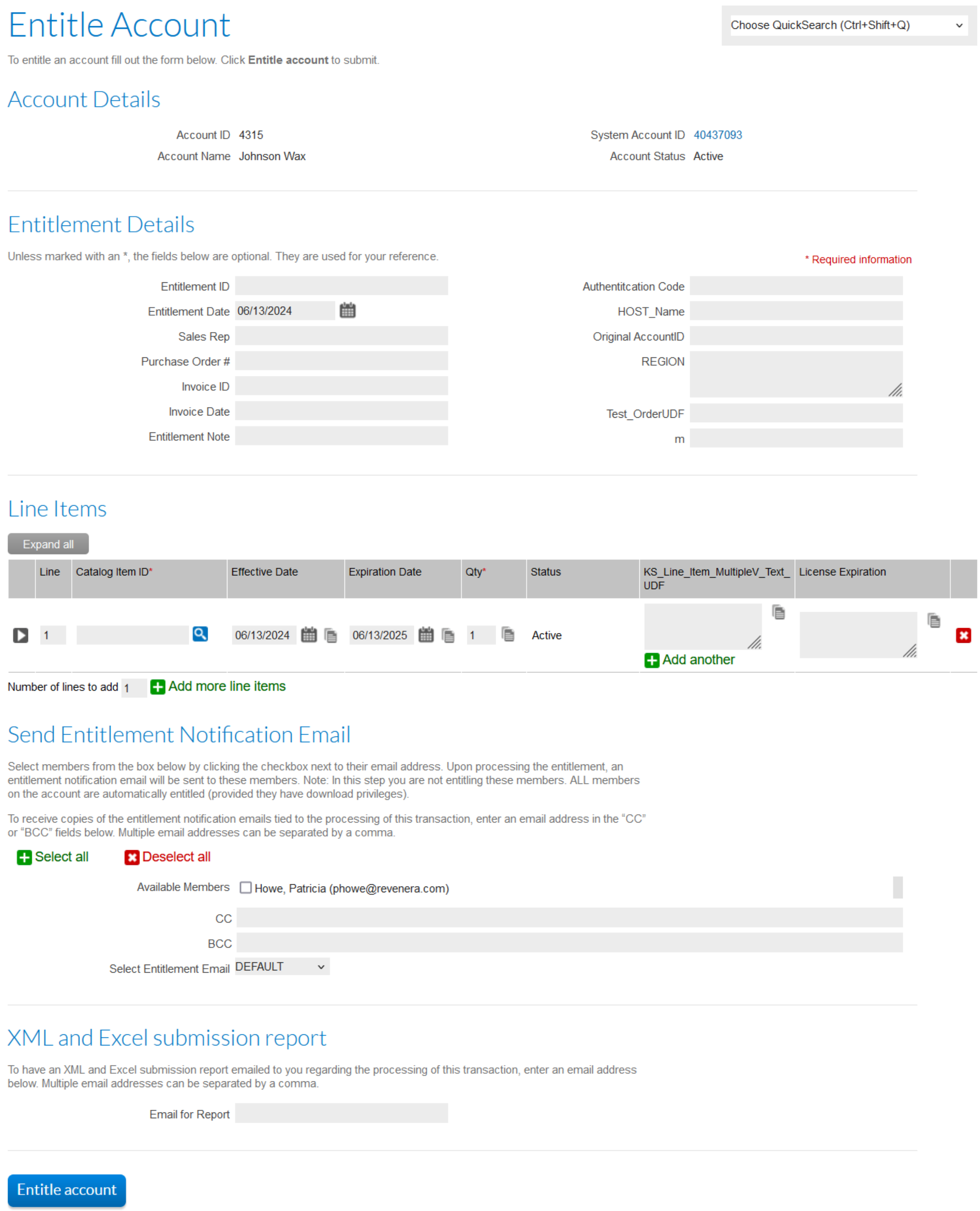


4. Enter required details on the **Add a Member** page.

   Consider the following while entering the details in the required fields on the **Add a Member** page:

   - Most fields are self explanatory; required fields are denoted with an asterisk (*) sign.
   - **Member ID** is optional, but you can reuse the email address if you don’t have one and want to set it.
   - Be sure to set the Member’s permissions. Account Administrators can add or remove Members from the Account on the FlexNet Operations LLM (download) site.

   If there is a 1-1 relationship between Account and Member, then click **Save & entitle account ...** to complete the transaction. The **Entitle Account** page opens.

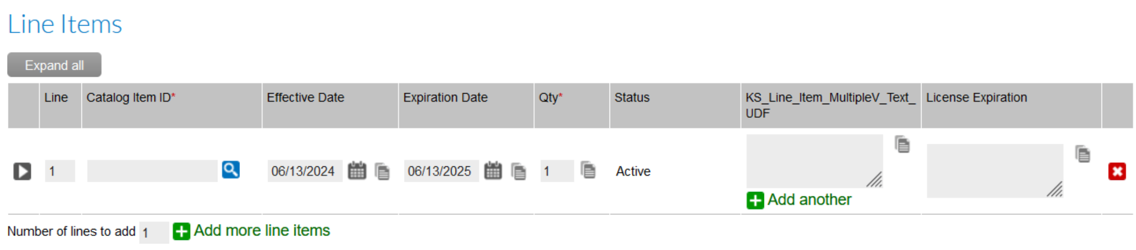


5. On the **Entitle Account** page, you can start by choosing the members to receive the Order Notification email in the **Send Entitlement Notification Email** area.

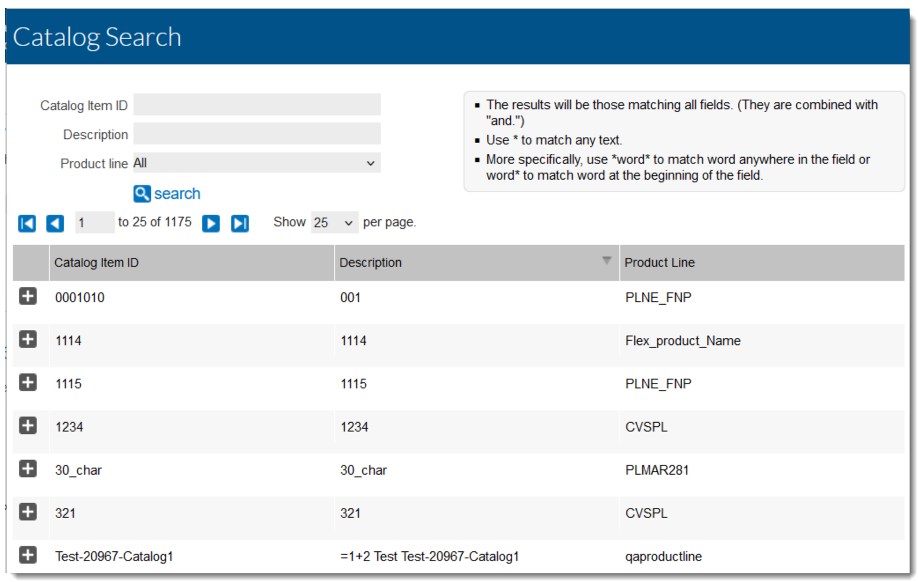
***Note** ▪ This only controls Email notification, not Entitlements. All Members on an Account share the same Entitlements.*

6. Enter data into the **Entitlement Details** area. Fields are self explanatory and optional, but they can be used in the Order Notification email, as well as appear in the Order History section of the FlexNet Operations LLM End User Portal.

7. If you know the exact Catalog Item ID that you want to entitle this customer to, enter it in the **Catalog Item ID** field in the **Line Items** area.



If you are unsure of the exact **Catalog Item ID** to use, you can search for it by typing in a partial Catalog Item ID (* is wildcard), and then click the Search icon. The **Catalog Search** dialog box opens.



8. Choose the appropriate Catalog Item from the dialog by clicking the **Catalog Item ID**.

9. Enter the **Effective Date** and **Expiration Date** for access to this Line Item, or leave the default values.

10. You can enter quantity (**Qty**) and extended price which are only used for display purposes in the Order History. FlexNet Operations LLM also supports the ability to store and display License Codes. Contact your Project or Account Manager for more information.

11. If desired, you can click **Add more line items** to add additional line items to this Entitlement.

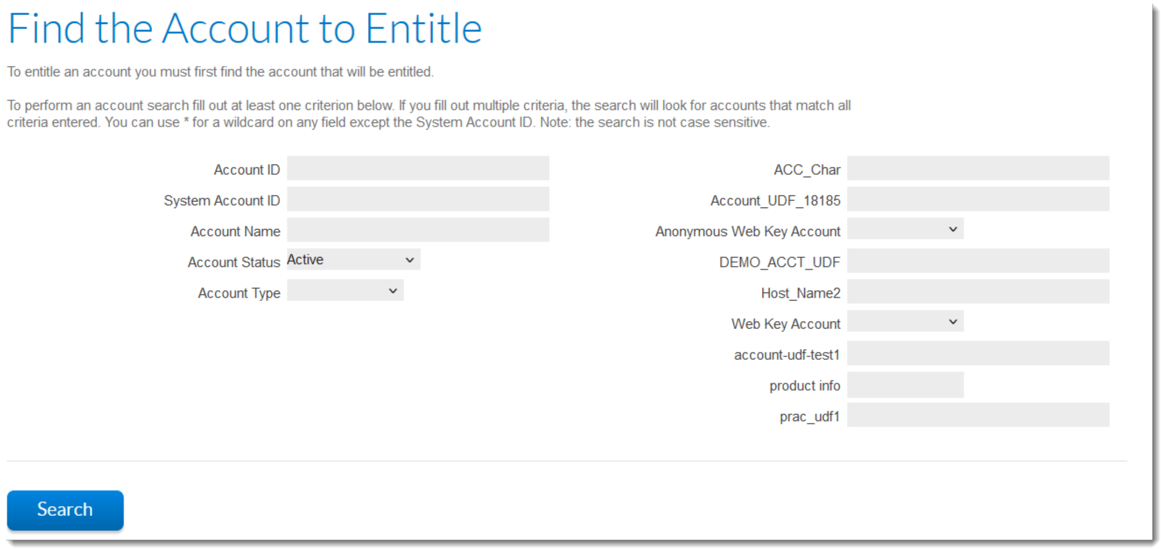
12. Click **Entitle account** at the bottom of the screen.

Entitling an Existing Customer Account

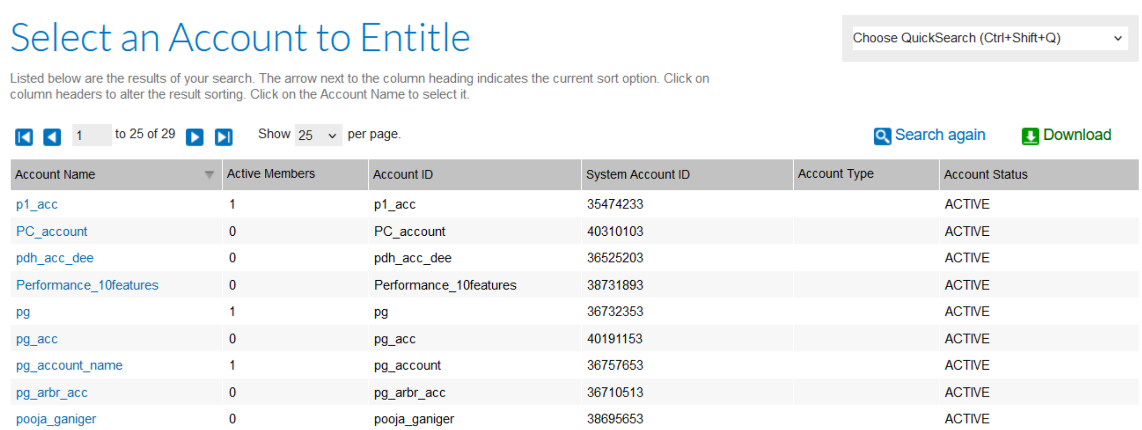
To entitle an existing customer account, perform the following steps.

Task ***To entitle existing Accounts:***

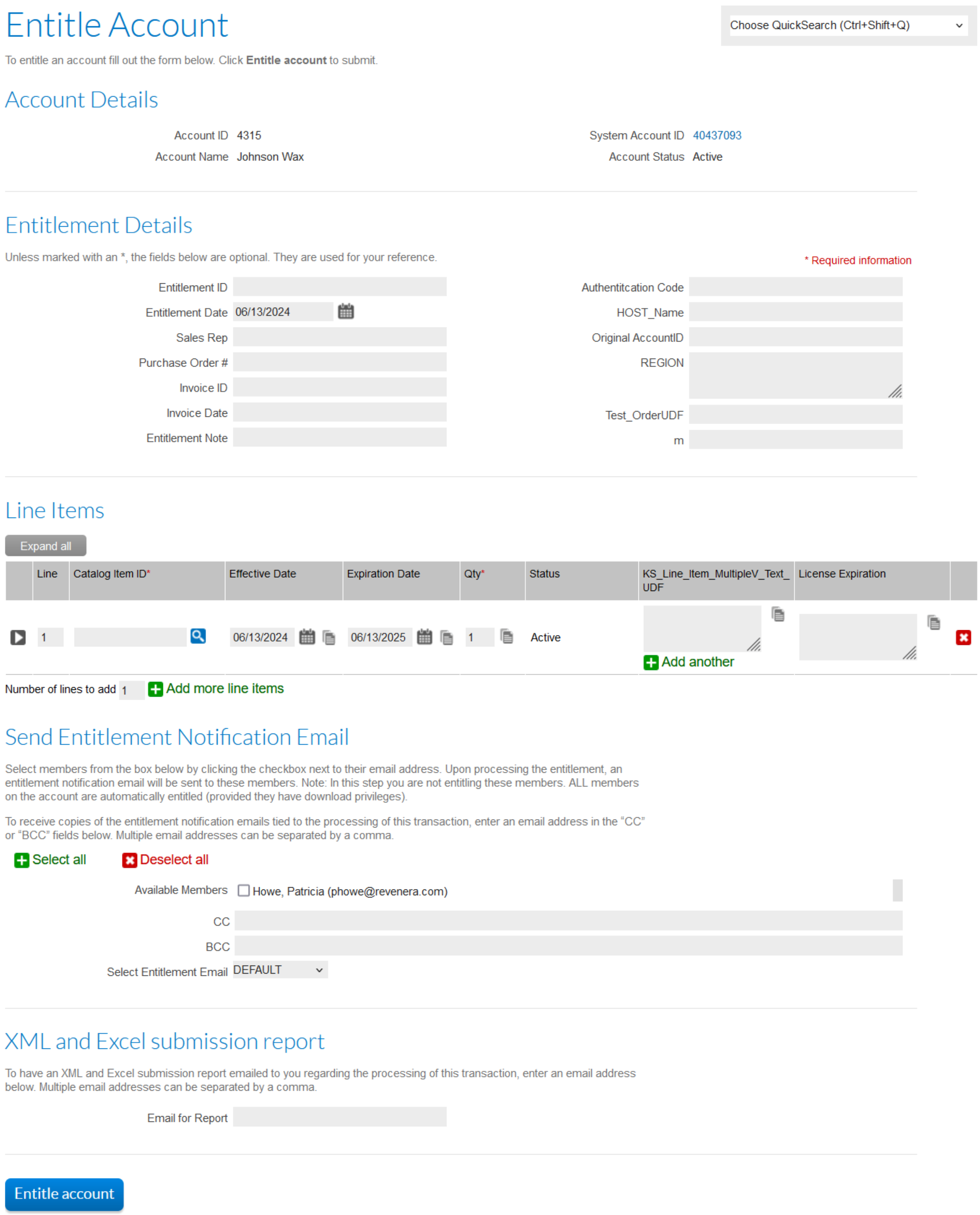
1. On the **Entitle Customers** menu, click **Entitle Account**. The **Find the Account to Entitle** page opens.



2. Enter search parameters and click **Search**. The **Select an Account to Entitle** page opens.



3. Click on an **Account Name** to choose that account. The **Entitle Account** page opens.

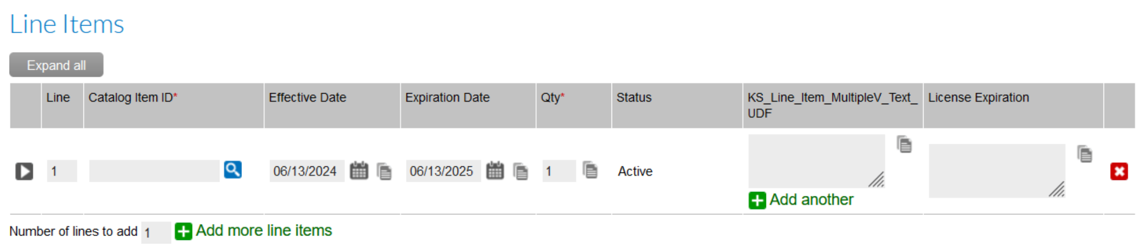


4. On the **Entitle Account** page, you can start by choosing the members to receive the Order Notification email in the **Send Entitlement Notification Email** area. :

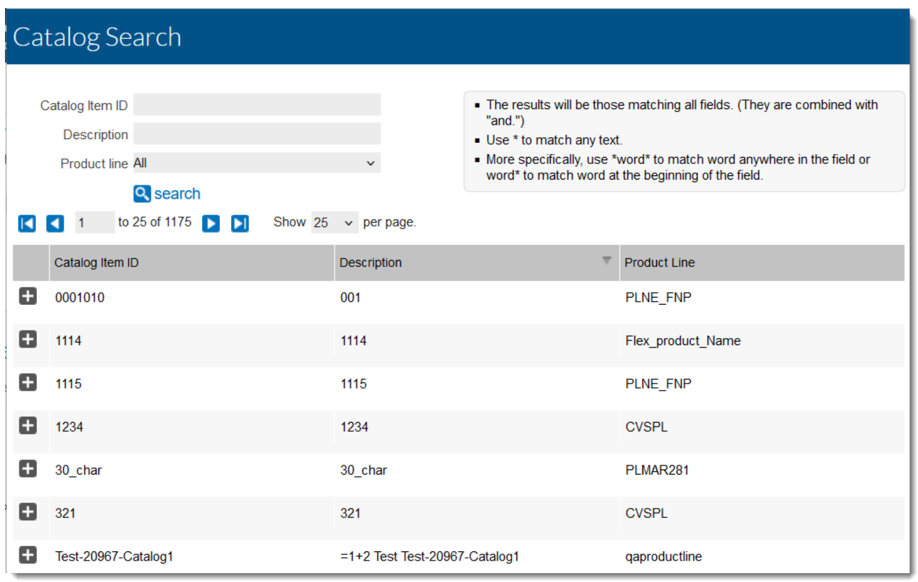
***Note** ▪ This only controls Email notification, not Entitlements. All Members on an Account share the same Entitlements.*

5. Enter data into the **Entitlement Details** area. Fields are self explanatory and optional, but they can be used in the Order Notification email, as well as appear in the Order History section of the FlexNet Operations LLM End User Portal.

6. If you know the exact Catalog Item ID that you want to entitle this customer to, enter it in the **Catalog Item ID** field in the **Line Items** area.



If you are unsure of the exact **Catalog Item ID** to use, you can search for it by typing in a partial Catalog Item ID (* is wildcard), and then click the Search icon. The **Catalog Search** dialog box opens.



7. Choose the appropriate Catalog Item from the dialog by clicking the **Catalog Item ID**.

8. Enter the **Effective Date** and **Expiration Date** for access to this Line Item, or leave the default values.

9. You can enter quantity (**Qty**) and extended price which are only used for display purposes in the Order History. FlexNet Operations LLM also supports the ability to store and display License Codes. Contact your Project or Account Manager for more information.

10. If desired, you can click **Add more line items** to add additional line items to this Entitlement. Then repeats these steps for each item.

11. Click **Entitle account** at the bottom of the screen.

3

Accounts & Members

This section describes FlexNet Operations LLM Producer Portal internal users/accounts and how to manage user permissions.

- Internal Users/Internal Accounts
- Managing Accounts & Members
- Managing User Permissions

Internal Users/Internal Accounts

This section provides guidelines to FlexNet Operations LLM Producer Portal customers on setting up and managing internal users of their FlexNet Operations LLM Producer Portal site.

Electronic delivery of software through FlexNet Operations LLM Producer Portal is valuable to internal users for the following reasons:

- Access to the most current versions of the software
- Readily accessible from remote locations, such as customer sites
- Convenience
- Possible to see customer's view of accessible software

Information about internal users/accounts is found in the following sections:

- Types of Internal Users/Accounts
- Options for Setup of Internal User Accounts

Types of Internal Users/Accounts

Many departmental users derive further benefits from the use of FlexNet Operations LLM Producer Portal. The following examples illustrate the multiple departments that take advantage of FlexNet Operations LLM Producer Portal and the unique benefits that they receive from the service:

Administrative Internal Users

FlexNet Operations LLM Producer Portal users can perform advanced tasks:

- Access to the FlexNet Operations LLM administrative tools – Producer Portal and Reporter
- Reviewing and validating product hierarchy
- Testing the entitlement set up and download experience on FlexNet Operations LLM Producer Portal.

Departmental Internal Users

There are five types of departmental internal users, each with different sets of permissions.

Sales

- Access to current versions of all available software
- Access to Evaluation products
- The ability to access and demonstrate software to prospects

Professional Services / Solution Engineers

- Access to software available to particular customer accounts
- On line access to entire set of current product offerings, including latest releases, version and patches
- Installation of software on-site at customer location

Development

- Awareness of how products are presented to customers
- Online access to entire set of current product offerings

Quality Assurance

- Final validation of product quality as experienced by the end customer

Support

- Troubleshoot download experience for specific customer
- Awareness of how products are presented to customers
- Access to current versions of all available software

Options for Setup of Internal User Accounts

The following table illustrates the options for setup of internal user accounts, describes the advantages and disadvantages of each option, and includes Revenera’s recommendation for the appropriate departmental use.

Table 3-1 ▪ Options for Setup of Internal User Accounts

Option	Description	Advantages	Limitations	Recommended Internal User Group
A	Internal users setup on one internal FlexNet Operations LLM Producer Portal account with access to all available software	• Users able to access all available products and releases • Low maintenance for Manufacturer—add all qualified users to one account	• Control of usage limited—everyone can access everything • Reporting not specific to customer when internal users download on customer behalf	• Administrative • Development • QA • Support
B	Internal users on internal account(s) with access to a predetermined subset(s) of software	• Users able to access applicable software • Increased usage control—internal users are only provided access to applicable software	• Increased maintenance for Manufacturer—likely will need to support multiple internal accounts and manage user and software entitlement	• Sales • Development • QA • Support
C	Internal users added as users of customer account(s), as and when access is necessary	• Access to software limited to customer account entitlement • Usage tracked by customer	• Increased maintenance for customer—need to add internal user • Customer perception of intrusion by Manufacturer—internal users shown as account members	• Professional Services/SE
D	Internal users proactively added to customer accounts	• Access to software limited to customer account entitlement • Usage tracked by customer • Reduced maintenance effort and inconvenience for customer	• Increased maintenance for Manufacturer—need to add internal users • Customer perception of intrusion by manufacturer—internal users shown as account members	• Professional Services/SE • Support

Additional Considerations

- For Options A or B above, assign only 2-3 users with administrative privileges per internal account to better manage access.

- For any of the Options selected, the FlexNet Operations LLM Producer Portal customer should define an internal plan with process on how internal members are set up.

Managing Accounts & Members

This section explains how to manage accounts and members.

- About the Manage Accounts Menu
- Accounts
- Members

About the Manage Accounts Menu

You can use the items on the **Manage Accounts** menu of the FlexNet Operations LLM Producer Portal to create and edit Producer Portal accounts (generally equivalent to your "customer") as well as Producer Portal members (generally equivalent to your "user").

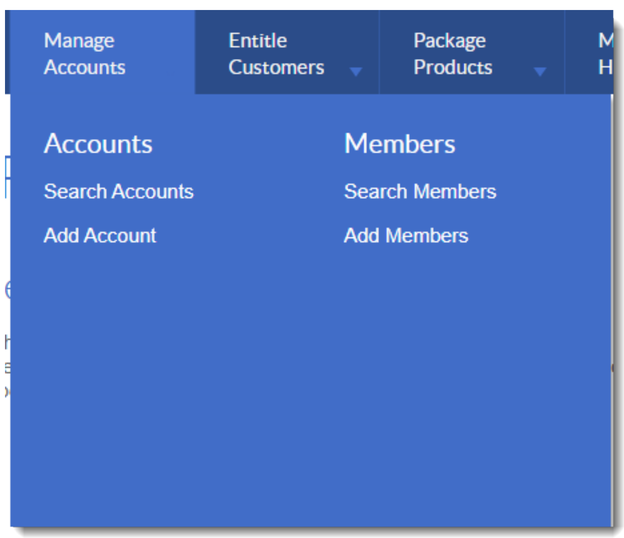


Figure 3-1: Manage Accounts Menu

You begin managing accounts and members by either searching for, or selecting, an existing account or member or by creating a new one. Since members must belong to an account ,you can't add a member without first selecting or creating an account.

You can use the **Quick Search** box on the FlexNet Operations Home page to quickly find an account or member if you know the Account Name or ID or the Member Last Name or Email Address respectively. If your criteria match more than one account or member you will be given the opportunity to choose the account or member from a list. This function is not case sensitive and supports the use of the "*" character as a wildcard in most fields.

Accounts

The pages related to managing accounts are described in this section:

- Search Accounts
- Add Account
- View Account
- Edit Account
- Merge Accounts
- View Transactions
- View Emails

Search Accounts

You can search for an account by the:

- **Account Name**—Descriptive name that your company uses to identify customers
- **Account ID**—Unique identifier that your company's internal systems may use to identify your customers
- **System Account ID**—Unique identifier created by the System when the account was first set up on Producer Portal

The **Search Accounts** function is not case sensitive and supports the use of the “*” character as a wildcard.

Note *▪ Wildcards cannot be used for System ID fields.*

If your search criteria match more than one account, then you are given the opportunity to choose the account you are looking for from a list of those matching your criteria.

Add Account

The Producer Portal account is normally equivalent to your “customer”. When you make software available (entitle) to your customers through Producer Portal, you make it available to an account. An account may have many members and all of these members have access to the same software. They can see who else on the account has downloaded software. They can share notes between themselves. If they are administrators, they can add or delete other members to the account.

When you add an account you must provide:

- **Account Name**—Descriptive name that your company can use to identify this customer.
- **Account ID**—Unique identifier that your company’s internal systems may use to identify your customers.
- **Additional fields**—Any additional fields which are specific to your company and which your company identified as required when you set up your Producer Portal service.

  Note *▪ Required fields are indicated by an * in the Producer Portal.*

You may also provide:

- **Account Note**—Optional free form text that you want to associate with this account. An example would be that this customer changed its name or the CEO is a particular friend of your CEO. Account notes are for internal use by your company and are only visible through Producer Portal and FlexNet Operations Reporter and do not show up on the FlexNet Producer Portal site.
- **Additional fields**—Any additional fields which are specific to your company and which your company defined identified as optional when you set up your Producer Portal service.

Once you have filled out the **Add Account** form, you may select:

- **Add Account** which will create the account and then display the account information along with options to modify the account, entitle the account to products, or add members to the account.
- **Submit & Add Another Account** which will create the account and then return you to a blank **Add an Account** screen where you can immediately add another account.
- **Submit & Add Members to this Account** which will create the account and then automatically take you to the **Add Member** screen where you can begin adding members to the account you just created.

View Account

When you search for or select an account, the system will display the **View Account** screen. The **View Account** screen displays all of the attributes of the account.

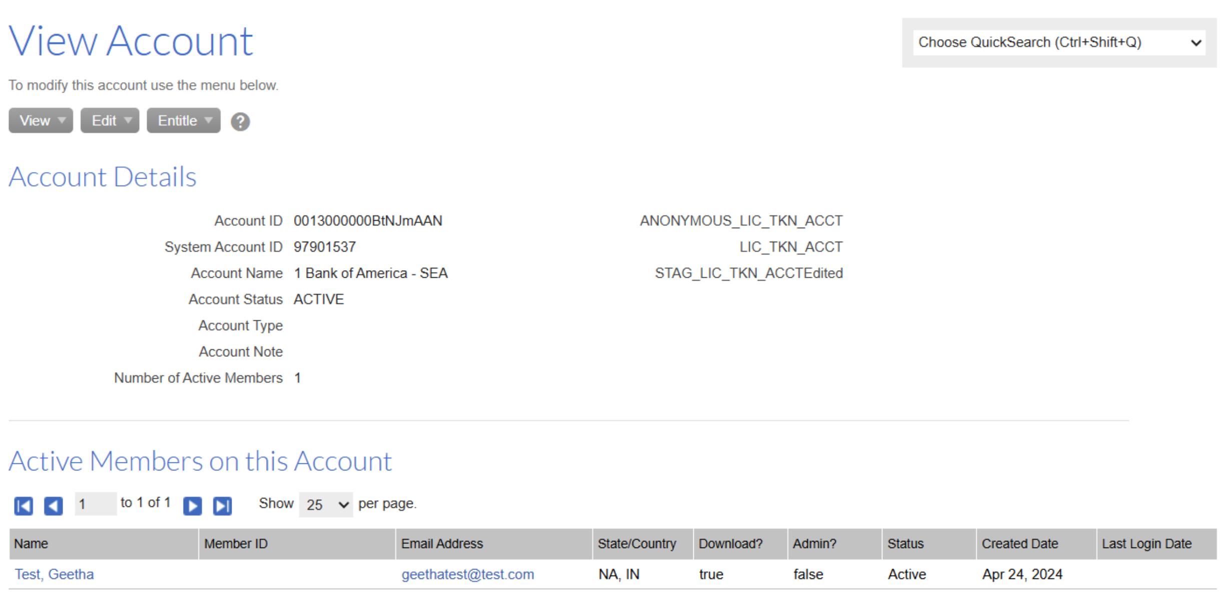


Figure 3-2: View Account Screen

From this screen you can choose to:

- **Edit**—You can edit the account record by selecting **Edit > Edit this Account**.
- **Add members**—You can add members to the account by selecting **Edit > Add Member**.
- **Entitle**—You can entitle the account to software by selecting **Entitle > Entitle Account**.

- **View entitlements**—You can view all of the entitlements associated with the account by selecting **View > View Entitlements**.

Edit Account

You can use the **Edit Account** page to modify the **Account Name** and **Account Notes**. The **Edit Account** page is essentially the same as the **Add Account** page.

When you are viewing an account, you are also shown a list of the members of the account. You can see detailed information for a member and switch to the **View Member** page by clicking on the member name. You can also click on the member email address to send them an email.

You can add new members to the account by selecting **Edit > Add Member**.

Clicking **Entitle > Entitle Account** will take you to the **Entitle Account** page where you can create an Entitlement for this account.

If you select **View > View Entitlements**, you will be shown a list of all the entitlements for the account. Selecting an entitlement lets you see the details of that entitlement and gives you the opportunity to edit the entitlement as well.

Merge Accounts

You can use the **Edit > Merge this Account** menu item on the **View Account** page to merge the accounts, members, and entitlements.

View Entitlements

Select the **View > View Entitlements** menu item on the **View Account** page to display all entitlements for the account. Then click on an individual **System Entitlement ID** to view it. If no entitlements exist for the account the **Search Entitlements** page appears.

View Transactions

Select the **View > View Transactions** menu item on the **View Account** page to display all transactions for the account. Click on an individual **System Transaction ID** to view it.

If no transactions exist for the account the **Search Transactions** page appears.

View Emails

Select the **View > View Emails** menu item on the **View Account** page to display all emails sent to the account. Click on an individual **System Email ID** to view it.

If no emails exist for the account, the system will display a status message to that effect.

Members

The pages related to managing members are described in this section:

- Search Members
- Add Member
- View Member
- Edit Member
- Member Preferences
- Member Permissions
- Inactivate/Reactivate Member
- View Transactions
- View Emails
- Resend Welcome Email
- Passwords

Search Members

On the **Search Members** page, you can search for a member using the following fields:

Table 3-2 ▪ Search Members Fields

Field	Description
Last name	User's last name
First name	User's first name
Email address	In the form username@company.com
Domain name	Part of the email address to the right of the "@"
Member ID	Unique identifier that your company's internal systems may to identify end users within your customers
Member status	You can search by one of the following: • **Active**—Currently able to login to Producer Portal. • **Inactive**—Members who have been administratively inactivated, either by someone in your company, or an administrator on the end user account. • Both **Active** and **Inactive**
State	Standard abbreviation for the U.S. state or Canadian province in which the user is located

Table 3-2 ▪ Search Members Fields

Field	Description
Country	Name of the country in which the user is located

You can also limit your search to only those members who are administrators of at least one Producer Portal account by selecting the **Member is Account Administrator** check box.

The search member function is not case sensitive and supports the use of the "*" character as a wildcard.

Note ▪ *Wildcards cannot be used for System ID fields.*

To limit the member search to only a subset of the accounts within Producer Portal, you may also provide an **Account Name**, **Account ID**, or **System Account ID** as with the account search.

If your search criteria match more than one user, then Producer Portal will display a list of all the members who match all of the criteria you have provided. You can then pick an individual member from this list.

Add Member

Since members belong to accounts, you must select or create an account before you can add new members to the Producer Portal.

If you select **Manage Accounts > Add Member** without first having selected an account, you will be given the opportunity to select the account via the **Find the Account to Add Members** page. This page works just like the **Search Accounts** page.

Once you have selected an account, you use the **Add Member** page to actually add a user the Producer Portal system. You will enter:

- **First and Last name**—The first and last name of the Member, this is used in email templates, etc.
- **Member ID**—Unique identifier that your company's internal systems may use to identify end users within your customers.
- **Email address**—Of the form username@company.com (This becomes the Login ID to the Producer Portal service).
- **Address information**—Up to 4 lines.
- **City**
- **State**—U.S. state or Canadian Province.
- **Postal Code**
- **Country**

You can also add

- **Job Title**— Such as VP Engineering or Sr. Purchasing Manager
- **Phone and/or Fax number**

- **Member Note**—Optional free form text that you want to associate with this member, such as the fact that this member is willing to be a beta tester. Member notes are for internal use by your company and are only visible through Producer Portal and FlexNet Operations Reporter. They do not show up on your FlexNet Producer Portal site.

There are two permissions that you set for each member:

- **Administrator**—Allows user to manage the account he/she is associated with. Administration functions include, adding and removing users from the account, creating additional administrators, restricting access to specific products. The default for the administrator permission is "off".

  Note ▪ *This setting has no effect if you have disabled the administrative features on your site.*

- **Download**—Allows user to download software. Users who do not have download permission can still be notified of updates and entitlements, but cannot download the software itself. The default for the download permission is “on”.

  Note ▪ *Administrators can change this attribute for members of their accounts, including themselves.*

- **Send Welcome Email to this member**—You can decide whether the system should send a welcome email by selecting the check box next to **Send Welcome Email to this member**. The Welcome Email template set up for your service will be used.

  Note ▪ *The member will only receive a welcome email if they do not already have a login to FlexNet Producer Portal.*

Note ▪ *When adding a member to an account that has no entitlements, be sure to entitle the account immediately after adding the member(s). Entitling the account will ensure the new member(s) will be able to access software when they access their account for the first time.*

Once you have filled out the **Add Member** page, you may select:

- **Add Member**—Which will create the create member and then display the member information along with options to make further changes to the member.
- **Submit & Add Another Member**—Which will create the member and then return you to a blank **Add Member** screen where you can immediately add another member to this account.
- **Submit & Proceed to Entitle this Account**—Which will create the member and then automatically take you to the **Entitle Account** screen where you can entitle the account you just created to software.

View Member

When you search for or select a member, the system will display the **View Member** screen. The **View Member** screen displays all of the attributes of the member.

From this screen you can choose to **Edit the member record** or A**dd a new Member** to the current account. You can also **Inactivate** and **Reactivate** the member.

Edit Member

You can use the **Edit Member** page to modify any of the member attributes except the **Member ID**, **Email Address**, and the **Login ID**. These three are special values which are used by the system that are modified on separate screens.

Member Preferences

You can use the **Member Preferences** page, which is opened by selecting **Edit > Set Preferences** on the **View Member** page, to view and/or modify any of the member's preferences.

Note ▪ *The member can also change these preferences through the FlexNet Producer Portal website.*

- **Email Preferences**—The **Email Preferences** determine at a high level if the member wants to receive emails and whether the member wants to receive update notifications.
- **Product Preferences**—With the **Product Preferences**, the member can limit the list of products in 2 ways:
    - **View** determines if the member will see the product when navigating or searching the FlexNet Producer Portal site.
    - **Email** determines if the member will receive **Update Notifications** for the product. The preference is set on the level of the **Product Line** and affects all the product that are belong to that **Product Line**.

Member Permissions

You can use the **Set Permissions** page to modify any of the member's permissions. The permissions determine what functionality is available to a user of the Producer Portal. You can grant or revoke the following permissions.

Note ▪ *You need to supply the codes only if you are submitting an XML file.*

Table 3-3 ▪ Member Permissions

Users with this permission:	Are able to:	Code
Basic View Access	See all of the information in the Producer Portal (read-only access.) ***Note*** ▪ *Required to log in to the Producer Portal and will be automatically assigned when any other permission is selected.*	PTNR
UAT Access	Access the User Acceptance Testing (UAT) environment for their site	UATA

Table 3-3 ▪ Member Permissions

Users with this permission:	Are able to:	Code
Manage Accounts Management	Add, Edit, Inactivate, and Reactivate all Manage Accounts information, including Update Member Login, Re-Identify Member, and Re-Identify Account. ***Note ▪*** *Required to be able to send a Welcome or Entitlement email from the Member/Entitlement pages.*	ACMR
Limited Manage Accounts Management	Add, Edit, Inactivate, and Reactivate all Manage Accounts Information (excludes Update Member Login, Re-Identify Member and Re-Identify Account).	LACM
Merge Accounts	Merge two Accounts into one Account, including Members and Entitlements.	MRGE
Reset Member Passwords	Regenerate a new password for an Enterprise Portal user without exposing the generated password.	PSWD
View As End User	Login to the Enterprise Portal site as the end user in a read-only mode.	VIEW
Entitlement Management	Enter new Entitlements, change existing Entitlements, and inactivate or reactivate Entitlement lines.	ORDE
Create Trial Entitlements	Create trial registration and submit/approve Trial entitlements in one step. ***Note ▪*** *Only available if you are utilizing FlexNet Operations Registration Site functionality.*	TENT
Licensing Support	Generate, return, upgrade and re-host licenses on behalf of an End user from the View Licenses display. Includes ability to grant additional returns per Entitlement line. ***Note ▪*** *Only available if you are utilizing a customized solution by Revenera.*	LISU
Package Products	Add and Edit all Catalog-related information, such as Catalog Items, Products, Files, Product Lines, Manufacturer, License Groups, and Agreements. ***Note ▪*** *Includes RSTF functions below.*	PDCT

Table 3-3 ▪ Member Permissions

Users with this permission:	Are able to:	Code
Deliver to Account	Add a File, upload an Image, and restrict the File to an Account, so that you can distribute files for custom code or hot fixes to specific Accounts. ***Note ▪** Sub-set of the PDCT permission above.*	RSTF
Create Email Notifications	Create Update Notification Email messages that are sent to all members who have access to a specific File or Product.	NOTF
Queue Email	Send emails that are created in the Producer Portal to a queue to be sent at a specified time. ***Note ▪** Required to be able to resend a Welcome or Entitlement email from an email log.*	QEML
Edit Unsent Emails	Change Email content and distribution lists for unsent (Draft Status) Emails. Users with this permission can also copy the Email content and distribution lists of existing Email messages. ***Note ▪** Required to be able to resend a Welcome or Entitlement email from an email log.*	AEML
Submit XML Transactions	Submit XML transactions from the Upload Transaction File option in the Producer Portal, or through an XML feed.	OEMF
Maintain Email Templates	Edit the content of Email templates.	TMPL
Maintain HTML Content	Update all of the documentation that is displayed as content on the FlexNet Operations site.	DOCS
Maintain UDF Values	Add additional values to the drop-down list that appears for existing User Defined Fields (UDFs).	UDFV
Download File Images	Download File Images from the Producer Portal interface	DNLD
Send Welcome Email	Send Welcome Email without having full Account/Member permissions	WELC
Reporter	Access to the Reporter application	REPT
Device Management	Manage devices	DVCM

Table 3-3 ▪ Member Permissions

Users with this permission:	Are able to:	Code
Transfer and Split Entitlements	Transfer and split entitlements to Allocation Groups.	XFER
Move Devices/Hosts	Move devices or hosts (servers) from one Account to another.	
Create Ad-hoc Emails	Create and send an email from the Producer Portal for a specific purpose, rather than one that is automatically triggered by a FlexNet Operations event, such as an Entitlement Confirmation or Product Notification. ***Important*** ▪ *Requires Super Administrator permission. Contact your System Administrator or Revenera Support to request Producer Portal Administrator permission.*	AHOC
Edit Sent Emails	Edit an email after it is sent, so that the content displays correctly when viewed in the email log of FlexNet Operations. ***Important*** ▪ *Requires Super Administrator permission. Contact your System Administrator or Revenera Support to request Producer Portal Administrator permission.*	EDTR
Maintain UDF Definitions	Create new UDF definitions. Users with this permission can also make changes to existing UDF definitions, such as whether the field is mandatory or optional, or whether a list of pre-defined values is displayed. ***Important*** ▪ *Requires Super Administrator permission. Contact your System Administrator or Revenera Support to request Producer Portal Administrator permission.*	UDFT
Producer Portal Admin	Grant and revoke the Producer Portal permissions listed in this table to users with the exception of AHOC, EDTR and UDFT. ***Important*** ▪ *Requires Super Administrator permission. Contact your System Administrator or Revenera Support to request Producer Portal Administrator permission.*	SMAD

Inactivate/Reactivate Member

If you choose to inactivate a member using the **Inactivate Member** function (by selecting **Edit > Inactivate** on the **View Member** page), the member will no longer be able to login to the service and will not get any further email updates.

When you inactivate the member you are given the option of sending an email message notifying the user that she has been inactivated. The Inactivate Member Email template set up for your service will be used.

Note ▪ *The Enterprise Portal portions of Producer Portal use the term* ***Cancel*** *rather than* ***Inactivate*** *but the behavior is the same.*

However, the member still exists in the system and you can reactivate it at will. To reactivate a member, search for and/or select the member and then select **Edit > Reactivate** on the **View Member** page. As with **Inactivate**, you have the option of sending a "welcome" email message to the user.

Note ▪ *When reactivating a member, the same password will be used.*

When you are working with a member record (such as updating the member) you can select **View > View Account** on the **View Member** page to view or make changes to the account to which this member belongs.

View Transactions

Select **View > View Transactions** on the **View Member** page to display all transactions for the member. Click on an individual **System Transaction ID** to view it.

If no transactions exist for the member the **Search Transactions** page appears.

View Emails

Select **View > View Emails** on the **View Member** page to display all emails sent to the member. Click on an individual **System Email ID** to view it.

If no emails exist for the member, the system will display a status message to that effect.

Resend Welcome Email

Select **Edit > Send Welcome Email** on the **View Member** page to have the system send a new welcome email to the member. The Welcome Email will use the current Welcome Email Template and the current member information, including the current password.

Passwords

If viewing your own member profile, select **Edit > Change Password** to change your Producer Portal Password to a new value that you specify.

If you are viewing another user's profile, select **Edit > Reset Password** to generate a new `word#word` password and have a Password Finder email sent.

Managing User Permissions

You are able to immediately grant permissions for FlexNet Operations LLM Producer Portal to others in your organization by using the **Set Permissions** option on the **View Member** screen. This document describes the process to set user permissions.

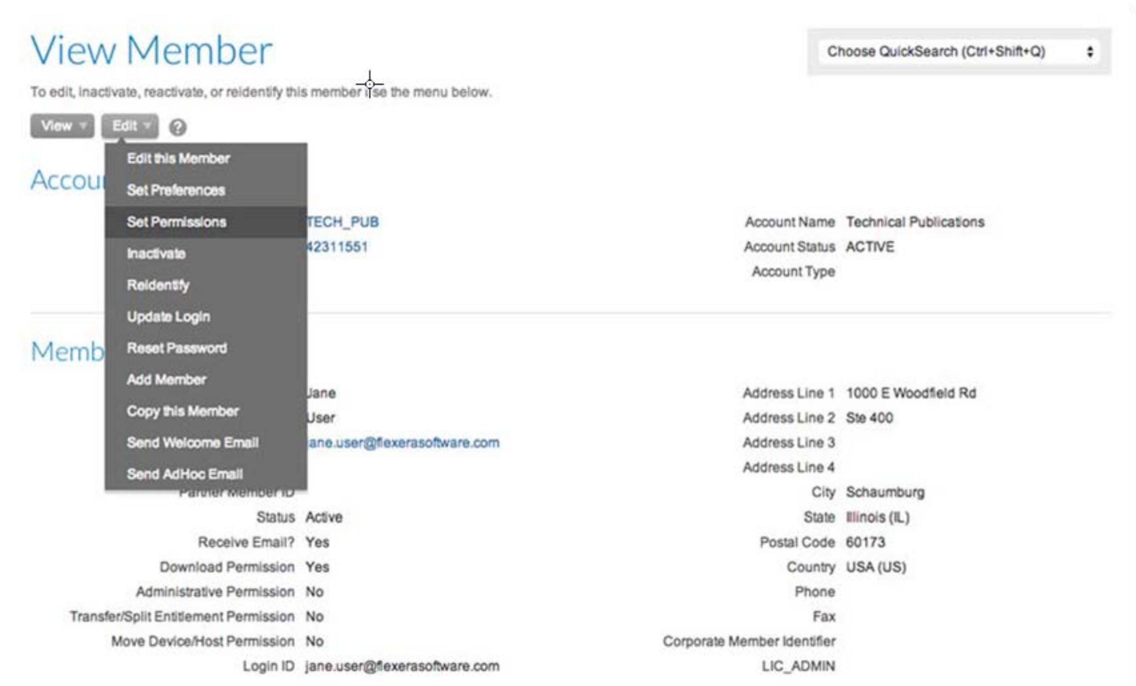
- Setting User Permissions
- User Permissions
- Security Considerations

Setting User Permissions

Permissions in FlexNet Operations LLM Producer Portal determine which functionality is available to a user. You must have the Producer Portal Administrator permission to manage permissions for your members. Contact your Revenera Customer Success Manager or Project Manager to enable this permission for you.

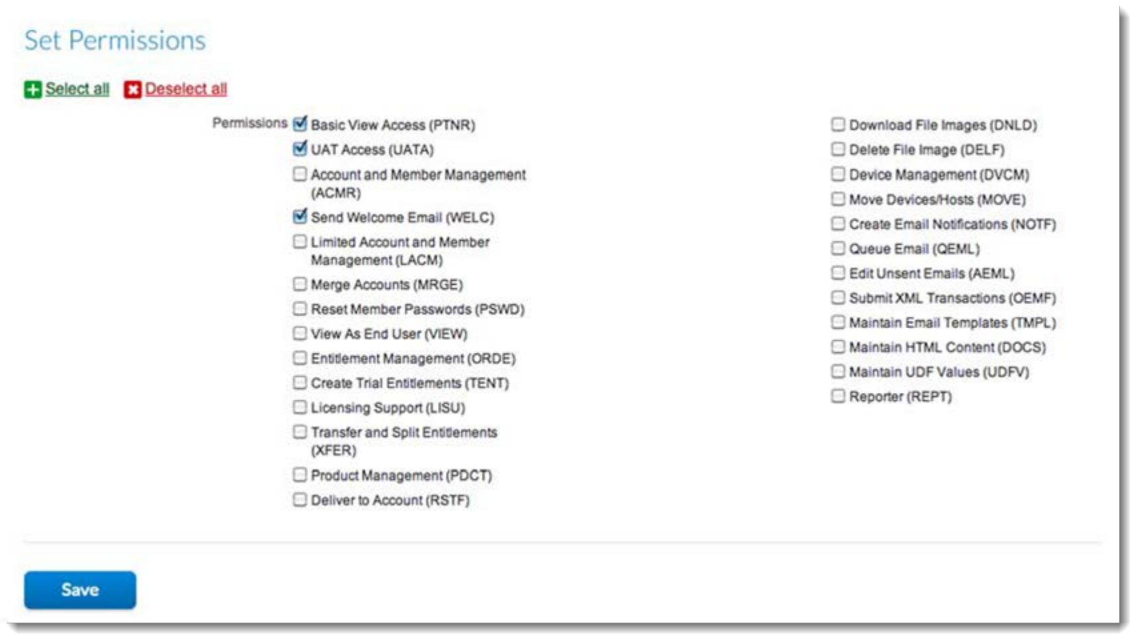
Task ***To manage permissions for your users:***

1. View the member to whom you would like to grant permissions on the **View Member** page.
2. From the **Edit** menu, choose **Set Permissions**.



3. Click check boxes to choose the applicable permissions, and then click **Save**.

Note ▪ *See User Permissions for more information.*



Note ▪ *You need to supply the permission codes (last column) only if you are submitting transactions via Converter templates, XML, or Web Services.*

User Permissions

FlexNet Operations has standard user permissions and administrative user permissions. Administrative permissions can only be assigned by a Revenera employee.

- Standard User Permissions
- Administrative Permissions

Standard User Permissions

The following are Standard user permissions.

Table 3-4 ▪ Standard User Permissions

Permission	Description	Code
Basic View Access	See all of the information in Producer Portal (read-only access.) ***Note ▪*** *Required to log in to Producer Portal and will be automatically assigned when any other permission is selected.*	PTNR
UAT Access	Access the User Acceptance Testing (UAT) environment for the Enterprise Portal or Producer Portal.	UATA
Account and Member Management	Add, edit, inactivate, and reactivate all account and member information, including Update Member Login, Re-Identify Member, and Re-Identify Account. ***Note ▪*** *Required to be able to send a Welcome email (see WELC permission, below, for exception) or Order email from the Member/Order pages.*	ACMR
Send Welcome Email	Send Welcome email from the View Member page without requiring the Account and Member Management permission (ACMR).	WELC
Limited Account and Member Management	Add, edit, inactivate, and reactivate all account and member information (excludes Update Member Login, Re-Identify Member and Re-Identify Account).	LACM
Merge Accounts	Merge two accounts into one account, including members and entitlements.	MRGE
Reset Member Passwords	Regenerate a new password for a FlexNet Operations end user without exposing the generated password.	PSWD
View as End User	Log in to FlexNet Operations Enterprise Portal as the end user in a read-only mode.	VIEW
Entitlement Management	Enter new entitlements, change existing entitlements, and inactivate or reactivate entitlement lines.	ORDE

Table 3-4 ▪ Standard User Permissions

Permission	Description	Code
Create Trial Entitlements	Create trial registration and submit/approve trial entitlements in one step. ***Note ▪*** *Only available if you are utilizing a customized solution by Revenera.*	TENT
Licensing Support	Generate, return, upgrade and re-host licenses on behalf of an end user from the View Licenses display. Includes ability to grant additional returns per Entitlement line. ***Note ▪*** *Only available if you are utilizing a customized solution by Revenera.*	LISU
Transfer and Split Entitlements	Allow a Producer Portal user to transfer and or split an entitlement on behalf of a customer.	XFER
Product Management	Add and edit all catalog-related information, such as Catalog Items, Products, Files, Product Lines, Manufacturers, License Groups, and Agreements. Also add and edit Device Capabilities, Device Series, and Device Models, and configure Add-Ons and License Model Additions. ***Note ▪*** *Includes RSTF functions below.*	PDCT
Deliver to Account	Add a file, upload an image, and restrict the file or product to an account, so that you can distribute files for custom code or hot fixes to specific accounts. ***Note ▪*** *Subset of the PDCT permission above.*	RSTF
Delete File Image	Delete file image previously loaded into Producer Portal.	DELF
Download File Image	Download file image in the Producer Portal.	DNLD
Device Management	Add and edit all device- and server-related information, such as devices, servers, mapping and removing add-ons, as well as generating capability responses.	DVCM
Move Devices/Hosts	Allow a Producer Portal user to move devices and or hosts on behalf of a customer.	MOVE

Table 3-4 ▪ Standard User Permissions

Permission	Description	Code
Create Email Notifications	Create Update Notification Email messages that are sent to all members who have access to a specific file or product.	NOTF
Queue Email	Send emails that are created in the Producer Portal to a queue to be sent at a specified time. ***Note ▪*** *Required to be able to resend a Welcome or Order email from an email log.*	QEML
Edit Unsent Emails	Change email content and distribution lists for unsent (Draft Status) emails. Users with this permission can also copy the email content and distribution lists of existing email messages. ***Note ▪*** *Required to be able to resend a Welcome or Order email from an email log.*	AEML
Submit XML Transactions	Submit XML transactions from the Upload Transaction File option in the Producer Portal, or through an XML feed.	OEMF
Maintain Email Templates	Edit the content of email templates.	TMPL
Maintain HTML Content	Add and edit HTML Content pages that can be displayed as content on the FlexNet Operations Enterprise Portal site.	DOCS
Maintain UDF Values	Add additional values to the drop-down list that appears for existing User Defined Fields (UDFs).	UDFV
Reporter	Access the Reporter tool. For UAT, if set with the UAT permission, it also allows access to the UAT Reporter user for that customer.	REPT

Administrative Permissions

The following permissions can be assigned only by a Revenera employee.Contact your Customer Success Manager or Project Leader to request any of these permissions.

Table 3-5 ▪ Administrative Permissions

Permission	Description	Code
Maintain UDF Definitions	Create new UDF definitions. Users with this permission can also make changes to existing UDF definitions, such as whether the field is mandatory or optional, or whether a list of pre-defined values is displayed.	UDFT

Table 3-5 ▪ Administrative Permissions

Permission	Description	Code
Manage FlexNet Secret Keys	View and download FlexNet Embedded binary identity files, edit FlexNet Embedded license models, view or upload FlexNet Embedded publisher.xml files, create or view FlexNet Publisher trusted configurations.	KEYS
Producer Portal Administrator	Grant and revoke the Producer Portal permissions listed in this table with the exception of those requiring Revenera intervention.	SMAD
Create Ad-hoc Emails	Create and send an email from the Producer Portal for a specific purpose, rather than one that is automatically triggered by a FlexNet Operations event, such as an Order Confirmation or Product Notification.	AHOC
Edit Sent Emails	Edit an email after it is sent, so that the content displays correctly when viewed in the FlexNet Operations email log.	EDTR
Password Check Bypass	Exempts the user from the Producer Portal password reset policy.	BYPS

Security Considerations

Consider the following:

- **Principal of least privilege**—Apply the “Principal of Least Privilege” when granting permissions to FlexNet Operations.
- **Procedures for immediate revocation**—Make sure that procedures are in place to immediately revoke access for any user whose employment is terminated or who no longer requires access to the application.
- **Periodic reviews**—Periodically review user accounts and reconfirm that access levels are appropriate.

4

Entitlements

FlexNet Operations LLM offers flexibility in managing the life cycle of software entitlements via automated or manual solutions. This chapter provides an explanation of the processes necessary for managing software Entitlements.

To facilitate a streamlined process flow for managing Entitlements in FlexNet Operations LLM Producer Portal, this chapter also includes the best practice for processing Entitlement-related transactions.

Background

This section describes some of the concepts relevant to FlexNet Operations LLM.

- **Entitlement**—An Entitlement is sometimes referred to as the order giving access to a software product. The Entitlement captures data relevant to the order ID, order details (what the customer purchased), and who placed the order.
- **Account**—An Account is the company in your order system (for example, Acme Inc). The Account is identified in FlexNet Operations LLM Producer Portal by both an Account Name and Account ID.
- **Member**—Single or multiple Members belong to an Account (for example, John Smith). A Member is identified in FlexNet Operations LLM Producer Portal by the Member Name, Member ID, and contact information such as address, phone, and job title.
- **FlexNet Operations LLM assigns Entitlements to Accounts**. All the Members belonging to an Account have access to the software owned by the Account.

The section includes the following topics:

- About Transactions
- Managing Entitlements

About Transactions

This section describes the transactions used in FlexNet Operations LLM:

- Transaction Methods

- Transaction Elements
- Transaction Types
- Transaction Methods Summary

Transaction Methods

This section provides a summary of the methods - manual and automated processes - available to create transactions.

You should be familiar with your own order processing system, products, and company revenue recognition and reporting requirements before you attempt to determine which transaction methods and processes are optimal for you.

It is also best to determine in an early phase whether the volume of transactions and the level of manual or automated processes you want to implement make one of these methods more suitable for your long-term resource management.

Table 4-1 ▪ Transaction Methods

Method	When you required	Who can use
FlexNet Operations LLM Producer Portal	Entitle one Account at a time in FlexNet Operations LLM Producer Portal. This method uses web forms to submit transactions.	Authorized users can use the web forms in FlexNet Operations LLM Producer Portal.
IXP Converter	Entitle single or multiple Accounts to single or multiple Entitlements at a time. This method allows you to input data into an Excel template and convert it into XML format, to submit transactions.	Authorized users of FlexNet Operations LLM Producer Portal can use the IXP tool provided by Revenera. This requires the installation of an IXP Converter tool and additional training. Contact your Account Manager to gain access to this tool.
XML Transaction API	Entitle single or multiple Accounts to single or multiple Entitlements at a time. This method uses Revenera's XML Client or your own in-house XML client to build transactions directly from your database. You can automate this method for "real-time" processing or "batched" processing (during certain times of day).	These transactions are system-generated and automated, and therefore require authentication and IT implementation.

Authorized users are those individuals who have completed training and have appropriate permissions to perform these functions. To grant authorization to someone in your organization, contact your Account Manager.

Transaction Elements

To decide which transaction elements to capture, consider the types of reporting data you require for revenue recognition purposes. This table illustrates a sample of the Transaction Data Elements per Transaction Type (for most commonly used transaction types).

Table 4-2 ▪ Transaction Data Elements Per Transaction Type

Field Name	Max Length	Process Order	Add Account	Add Member	Add Order
Transaction Type Code	(code)	ProcessOrder	AddAccount	AddMember	AddOrder
Account ID*	100	X	X	X	X
Account Name	100	X	X	X	X
Member ID*	100	X		X	
Last Name	30	X		X	
Email Address	100	X		X	
Address Line 1	100	X		X	
City	30	X		X	
If Country USA or Canada; State	(code)	X		X	
If Country USA or Canada; Postal Code	15	X		X	
Country	ISO 3166 code	X		X	
Order ID*	25	X			X
Line Number*	Integer >0	X			X
Catalog Item (SKU or Part Number)	40	X			X
Entitlement Effective Date	yyyy-mm-dd	X			X

Table 4-2 ▪ Transaction Data Elements Per Transaction Type

Field Name	Max Length	Process Order	Add Account	Add Member	Add Order
Entitlement Expiration Date	yyyy-mm-dd	X			X
Quantity	Integer >0	X			X
Optional					
Account Note	100	X	X	X	X
First Name	30	X		X	
Job Title	50	X		X	
Phone Number	30	X		X	
Fax Number	30	X		X	
Address Line 2-4	100	X		X	
If country not USA or Canada; State	30	X		X	
If country not USA or Canada; Postal Cd	15	X		X	
Admin Privilege Indicator	true/false	X		X	
Download Privilege Indicator	true/false	X		X	
Member Note	100	X		X	
Suppress End User Email	true/false	X		X	X
Order Date	yyyy-mm-dd	X			X
Purchase Order ID	100	X			X
Sales Rep	30	X			X
Invoice ID	25	X			X
Invoice Date	yyyy-mm-dd	X			X
Price	Float	X			X

Table 4-2 ▪ Transaction Data Elements Per Transaction Type

Field Name	Max Length	Process Order	Add Account	Add Member	Add Order
License Code	unlimited text	X			X
Order Note	100	X			X
Account/Member/ Order/Line Item UserDefined Field	50	X	X	X	X

The **Field Name** displays data fields that may be required or optional, depending on the Transaction type. For example, the **Add Account** transaction type requires the fields for **Account ID** and **Account Name**.

Verify that all of the character maximum length limits of FlexNet Operations LLM fields will accommodate the data generated by your own system.

Important ▪ *If your data exceeds the limits, notify your Account Manager in order to scope out alternatives or work to accommodate the new character lengths.*

ID fields are not required when submitting transactions via upload or automated interface. However, if you do not use unique identifiers, it will be very difficult to manage your Account / Member / Entitlement data. You are strongly encouraged to use unique identifiers for this reason.

User Defined Fields (UDFs) are data fields that are set up during implementation. They may contain data not otherwise collected in FlexNet Operations LLM fields. Some examples of UDFs are: Contract numbers, Site IDs, tracking Evaluation vs. License customers. In some cases, you may want the UDF data to appear on the customer End User Portal (for example, contract number in the order history). Contact your Account Manager to scope out work for this type of customization.

Transaction Types

This section describes Use Case Scenarios and Transaction types that are best for the use case.

Before you begin to process any Order-related transactions, verify that the set up for Product Management is complete. Refer to Product Set Up and Management.

In order for FlexNet Operations LLM to send out Welcome and Order emails when processing these Entitlement transactions, the Email templates must be set to a “live” status and have the send indicator turned “on”.

- **Welcome Emails** are system-generated and by default are sent to new Members added to FlexNet Operations LLM for the first time.
- **Order Emails** are system-generated and sent to a specified Member of the Account. You have the option to send or suppress Order Emails in order-related transaction types, as well as bcc internal email aliases.

You have the option to send a Transaction Report to yourself or an alias internally that was created in advance. An email of the Transaction Report contains all the data submitted and the status of the transaction--failed or successfully processed in FlexNet Operations LLM.

Use Case Scenarios

These transaction types have required Transaction Elements of data. Refer to the documentation section, **Entitlement_Template**, of the IXP Converter for the list of required and optional fields of data. The IXP Converter is available for download from https://tools.flexnetoperations.com. Contact your Account Manager to gain access.

Table 4-3 ▪ Use Case Scenarios

Use Case	Process to use	Transaction Type	Email
The order for an account exists in your order system, but the Account and Entitlement do not exist in FlexNet Operations LLM.	Create Account, Member, Order, in a single transaction type	Process Order	Options: Send/suppress order email to end user. ***Note*** ▪ *Bcc copies of email internally (for revenue recognition purposes).*
You acquire a third party product and customer base. **The order for an account exists in your order system, but the Account and Entitlement do not exist in FlexNet Operations LLM.**	Create Account, Member, Order, in a single transaction type	Process Order	Options: Send/suppress order email to end user. ***Note*** ▪ *Bcc copies of email internally (for revenue recognition purposes).*
You have a zero dollar fulfillment or need to give an Account access to software electronically for a customer satisfaction issue (such as physical shipment on back-order.) The order for an account exists in your order system, but the Account and Entitlement do not exist in FlexNet Operations LLM.	Create Account, Member, Order, in a single transaction type	Process Order	Options: Send/suppress order email to end user. ***Note*** ▪ *Bcc copies of email internally (for revenue recognition purposes).*
You identify a data entry problem and need to change the identifier of an existing Order. Account and Member already set up in FlexNet Operations LLM. This change is transparent to Member.	Change the identifier of an existing Order ID.	ReID Order	No emails are system generated for this transaction type.

Table 4-3 ▪ Use Case Scenarios

Use Case	Process to use	Transaction Type	Email
You have a credit/re-bill, or need to append license keys/correct other data on Order The Account exists in your order system, and is already set up for electronic access to software downloads in FlexNet Operations LLM.	Edit an existing Order in FlexNet Operations LLM in a single transaction type.	Edit Order	Options: Send/suppress order email to end user. ***Note** ▪ Bcc copies of email internally (for revenue recognition purposes).*
You have a new order for additional product, or a maintenance renewal for an account in your order system. The Account already exists in FlexNet Operations LLM.	Add a new Order into FlexNet Operations LLM in a single transaction type.	Add Order	Options: Send/suppress order email to end user. ***Note** ▪ Bcc copies of email internally (for revenue recognition purposes).*
You need to temporarily disable customer access to an Order because your Finance dept has the Account in collections. You want to keep the Order record intact within FlexNet Operations LLM and allow the Account continued access to the site for other products they own. **Reactivate line item on Order to reinstate access once Finance clears.**	Inactivate an existing Order in FlexNet Operations LLM in a single transaction type.	Order Line Activation	No emails are system generated for this transaction type.

Notes About Using the Process Order Transaction Type

If you specify any ID (Account/Member/Order):

- **If the ID does NOT exist** in FlexNet Operations LLM, the system will create it.
- **If the ID exists** in FlexNet Operations LLM, the system will edit (overwrite) the previous data.

This transaction type uses a combination of these other transaction types: **AddAccount**, **EditAccount**, **AddMember**, **EditMember**, **AddOrder**, and **EditOrder**.

- **If an Account does NOT exist** (by **AccountID**) in FlexNet Operations LLM, then the **ProcessOrder** transaction by default will use the transaction type **AddAccount** to create it.
- **If the Account exists**, then the **ProcessOrder** transaction by default will use the transaction type **EditAccount** to update the Account data (if the data is different in the most recent transaction).
- **If the Member does NOT exist** (by Member ID) in FlexNet Operations LLM, then the **ProcessOrder** transaction by default will use the transaction type **AddMember** to create it.
- **If the Member exists** in FlexNet Operations LLM, then the **ProcessOrder** transaction by default will use the transaction type **EditMember** to update the Member data (if the data is different in the most recent transaction).
- **If the Entitlement does NOT exist** (by Order ID) in FlexNet Operations LLM, then the **ProcessOrder** transaction by default will use the transaction type **AddOrder** to create it.
- I**f the Entitlement exists** in FlexNet Operations LLM, then the **ProcessOrder** transaction by default will use the transaction type **EditOrder** to update the Entitlement data (if the data is different in the most recent transaction).

Transaction Methods Summary

In this section, the components of data Transaction Methods, Transaction Elements, and Transaction Types have been reviewed. Once you determine the frequency for each of the defined Use Case Scenarios of your organization, you can make an informed choice to implement the best Transaction Method (manual vs. automated) across all Transaction Types.

Your decisions during implementation should be based on the resources available within your organization during the implementation phase and also in the longer term. If you consider these factors in advance, it will allow you to create and manage streamlined processes to manage Entitlements in FlexNet Operations LLM Producer Portal.

Managing Entitlements

This section describes how to manage entitlements in the FlexNet Operations LLM user interface:

- About the Entitlements Menu
- Search Entitlements
- Entitle Account Page
- View Entitlement Page
- Edit Entitlement Page

- View Transaction Page
- View Emails Page
- Send Entitlement Notification Email Page

About the Entitlements Menu

Using the items on the **Entitle Customers > Entitlements** menu of the Producer Portal lets you view, create and edit Producer Portal entitlements - generally equivalent to an “order” but also used to grant direct access to software without an order.

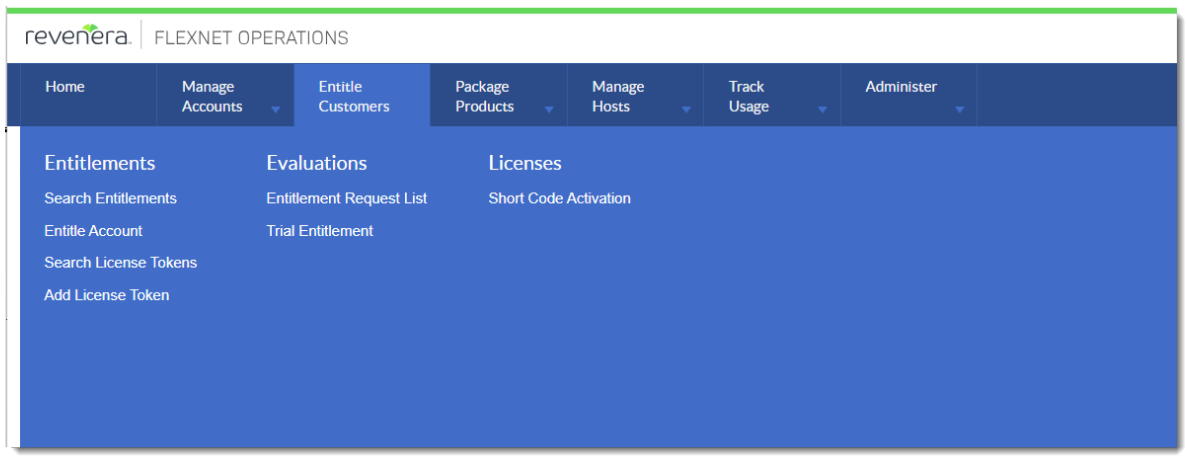


Figure 4-1: Entitle Customers Menu

You begin working with entitlements by either searching for and selecting an existing entitlement or by creating a new one. Since entitlements are granted to an account you can't add an entitlement without first selecting or creating an account.

You can use the **Entitlements** tab on the **Quick Search** box on the Producer Portal Home page to quickly find an existing entitlement if you know the **Entitlement ID** or **PO#**.

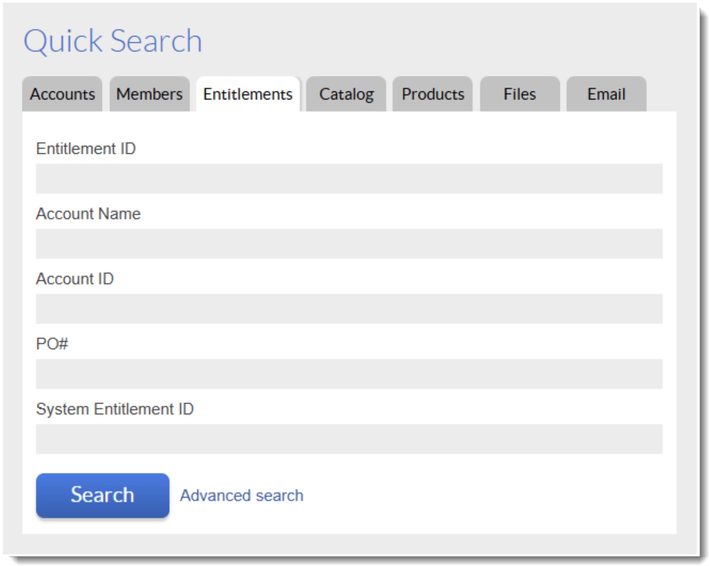


Figure 4-2: Entitlements Tab of Quick Search Box

If your criteria match more than one entitlement, you will be given the opportunity to select the entitlement from a list.

***Note** ▪ Searching on the Quick Search box is not case sensitive and supports the use of the "*" character as a wildcard in most fields.*

Search Entitlements

To view or edit existing entitlements either use the **Entitlements** tab of the **Quick Search** box or select **Entitle Customers > Search Entitlements** from the menu.

On the **Quick Search** box, you can search based on **Entitlement ID**, **Account Name** or **PO#** and other fields.

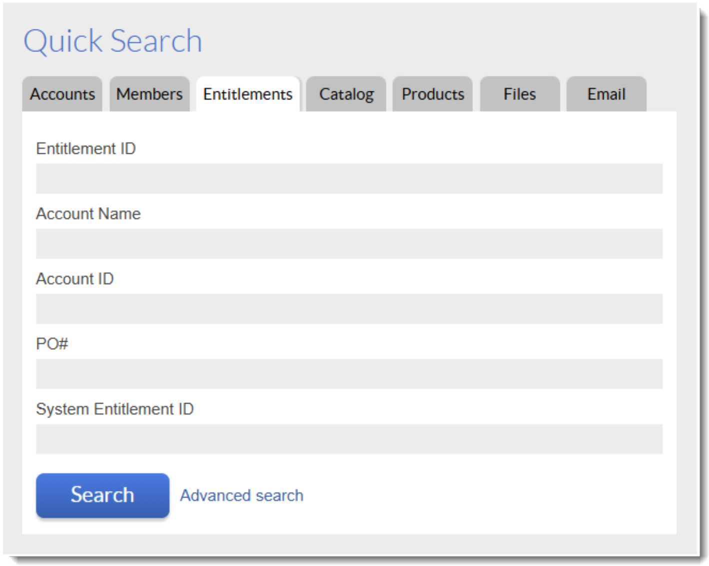


Figure 4-3: Entitlements Tab of Quick Search Box

On the **Search Entitlements** page, you can search for an existing entitlement based on the Entitlement ID, the System Entitlement ID, the Entitlement Date range, the Purchase Order Number, the Invoice ID, the Catalog Item ID, the Account Name, the Account ID, or the System Account ID. You can select the Entitlement you want to view or edit from the list that matches your search criteria.

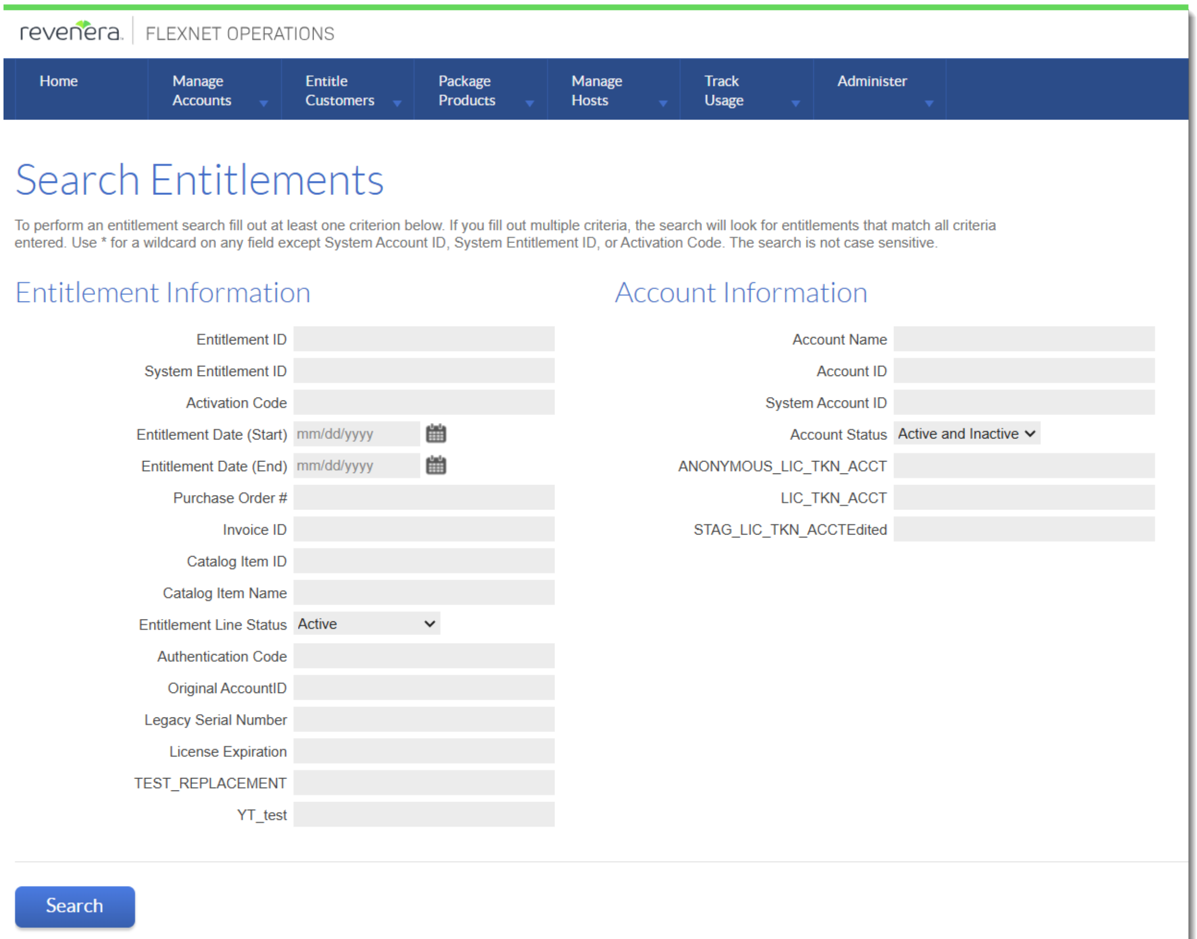


Figure 4-4: Search Entitlements Page

Entitle Account Page

***Note** ▪ Entitle Account is also known as Process Order.*

Since entitlements are granted to accounts, when you select **Entitle Customers > Entitle Account** from the menu, you are taken to the **Find the Account to Entitle** page so you can select the account you want to work on.

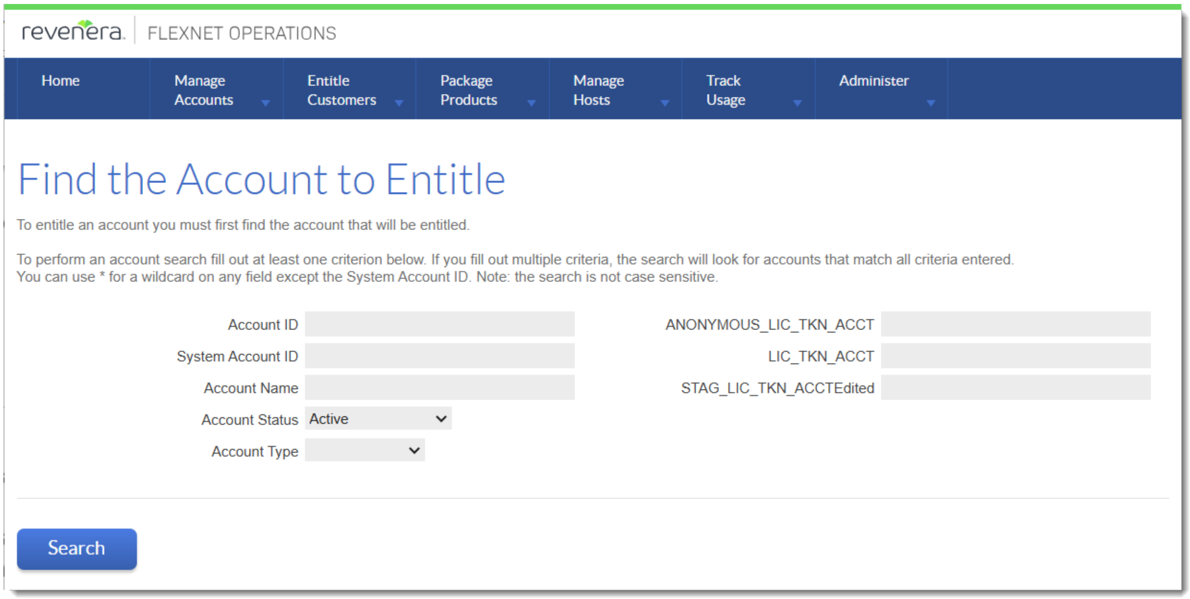


Figure 4-5: Find the Account to Entitle Page

This form is the same as the **Search Accounts** form except that once you select an account, you will be taken to the **Entitle Account** page.

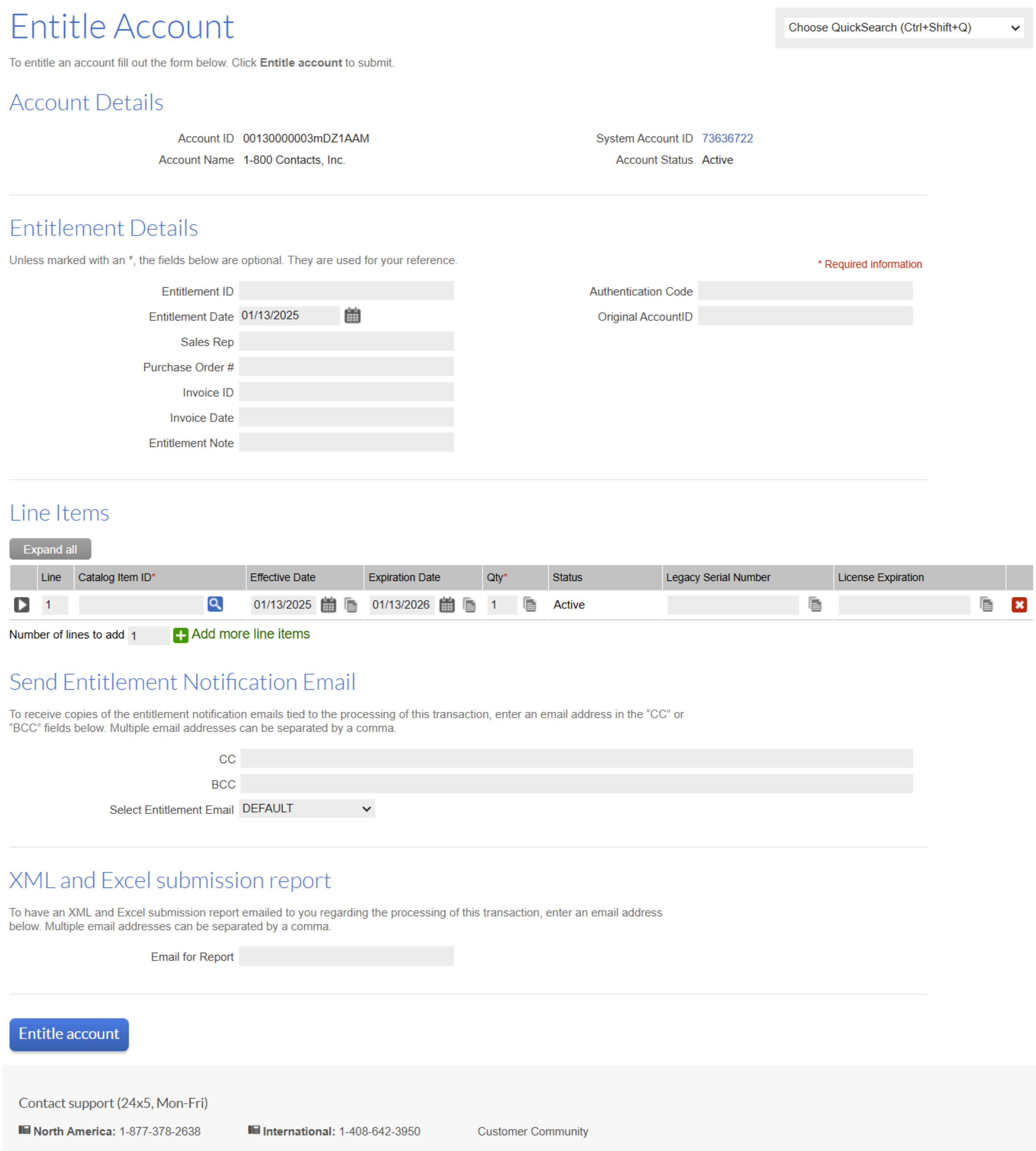


Figure 4-6: Entitle Account

To remind you of the account you are working on, the **Account Name**, **Account ID**, and **System Account ID** are shown at the top of the **Entitle Account** page.

Send Entitlement Notification Email

When you entitle an account, you are given the opportunity to **Send Entitlement Notification Email**. You do this by entering email addresses in the **CC** and **BCC** fields. Note that this list doesn't affect who has access to the software, only who gets the email notification. You can also turn email notification on and off for this entitlement by selecting **Don't Send** from the **Select Entitlement Email** list.

Entitlement Details

Once you have selected which members will be notified when the entitlement is processed, you can enter additional information about the entitlement itself in the **Entitlement** Details area. This is particularly useful if you are treating the entitlement as an “order” or if it is related to an order within your company's internal systems. Most of these fields are also visible to your customers through the **Entitlement History** section of the Producer Portal, if it is enabled on your site. The fields you can enter under **Entitlement Details** are:

Table 4-4 ▪ Entitlement Details

Field	Description
Entitlement ID	One of the values you can use when searching for entitlements and when reconciling the Producer Portal system to your internal systems (note that this field is optional, but if it is used, it must be unique).
Entitlement Date	Reference date for this entitlement, usually the current date but it may be the effective date of the Entitlement.
Sales Rep	Name of the person who sold the entitlement.
Purchase Order #	Usually the purchase order that your customer supplied.
Invoice ID	Usually your invoice number.
Invoice Date	Date you invoiced your customer.
Entitlement Note	Other information that your company would like associated with this entitlement, for example, that this entitlement was based on a call to customer support.

You can also enter values for any additional entitlement header fields unique to your company that were specified when your Producer Portal site was set up.

Line Items

Once you have entered the appropriate entitlement header information, you can enter one or more line items. There is one line item for each Catalog Item ID that you want to deliver. For each line item the standard entries are:

Table 4-5 ▪ Line Item Properties

Property	Description
Line #	The line numbers will default to a sequence starting with one, but you can also specify them, for example if you are only using Producer Portal for some of the items on your company's order form

Table 4-5 ▪ Line Item Properties

Property	Description
Catalog Item ID	Your company's part number for the product you sell as defined when setting up the product in Producer Portal, e.g., a one year maintenance contract for a particular product. If you enter a search term, including wildcards ("*"), in this field and then click "Find" the system will open a new window displaying a list of all the Catalog Item ID's matching your criteria. If you select one of these Catalog Item ID's the system will populate both the "Catalog Item ID " and the "Catalog Item Name" field on this Entitlement line. You can also directly type in an exact Catalog Item ID already in the system.
Catalog Item Name	Your company's common or user friendly name for the product you sell as defined when setting up the product in Producer Portal. Select using Find or enter exact Catalog Item Name already in system.
Effective Date	Date when should the user begin getting access to the product
Expiration Date	Date when should the user stop having access to the product or to updates to the product depending on the Catalog Item type
Quantity	The number sold. If your site is configured for it, the quantity determines the number of downloads that will be be allowed for Catalog Items that are set up as "limited download Catalog Items"
Price	Informational field for you and your customer
License Code	Serial number or license key which the end user will use to install or run the product. The license code is available to the end user through the Producer Portal site if the Catalog Item ID was set up to accept License Codes.

If your company has specified any additional fields at the line item level they can also be entered on the form.

When the **Entitle Account** page is first displayed, only one line item is displayed. If an entitlement has more than one line item, you can create additional line items by entering the number you want, and clicking on **Add more line items**. Every line on the entitlement must have a valid Catalog Item ID and other required information. You can delete extra lines by clicking the red "X" button.

XML and Excel Submission Report

To have a copy of the submission report for this Entitlement, indicating whether the Entitlement was successful or not, emailed to you or to other people simply enter one or more email addresses in the **Email for Report** box.

Entitling the Account

Click **Entitle Account** at the bottom of the page for this entitlement to take effect.

View Entitlement Page

When you search for or select an entitlement, the system will display the **View Entitlement** page, which displays all of the attributes of the entitlement.

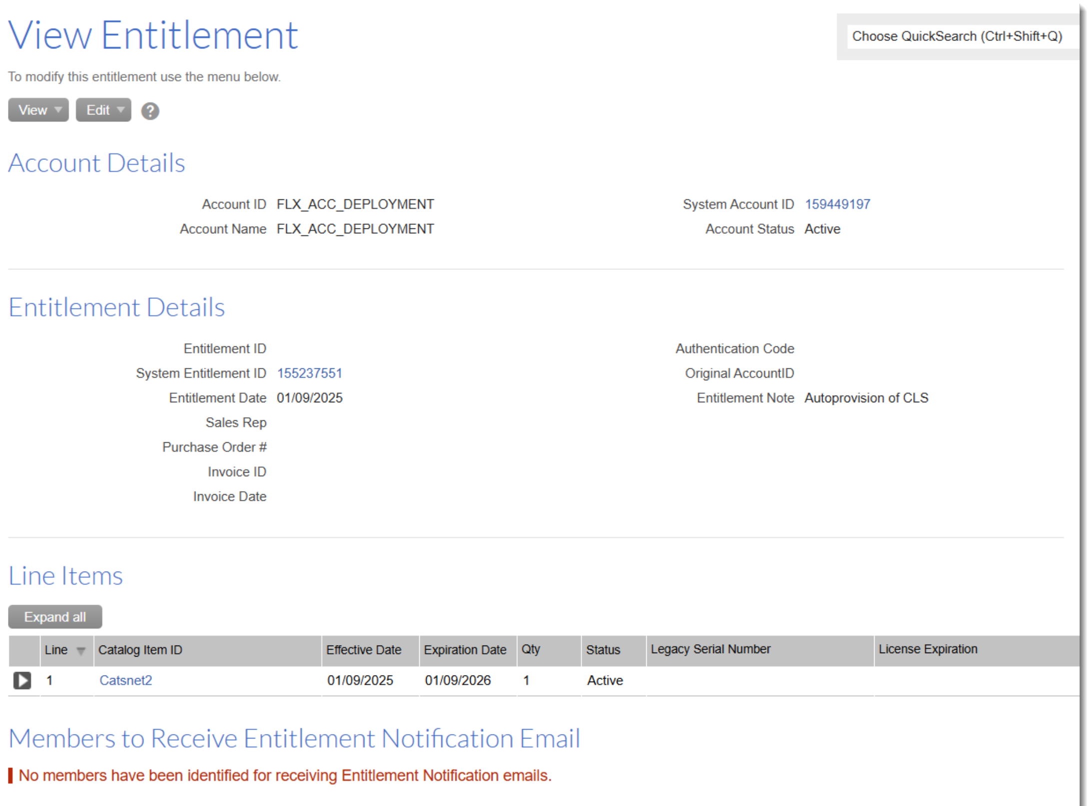


Figure 4-7: View Entitlement Page

On this page, you can choose to edit the entitlement record by selecting **Edit > Edit this Entitlement**.

Edit Entitlement Page

Once you have found an entitlement you can make changes to it by selecting **Edit > Edit this Entitlement** on the **View Entitlement** page.

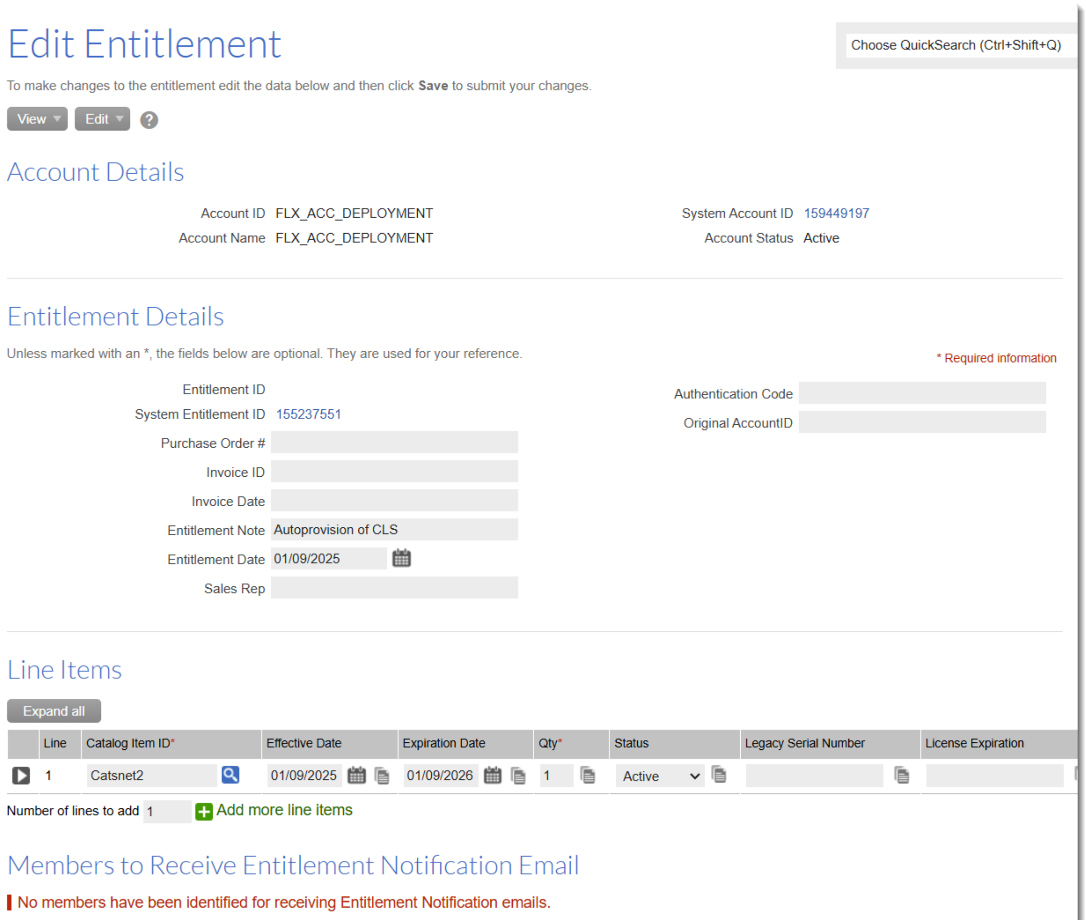


Figure 4-8: Edit Entitlement Page

On the **Edit Entitlement** page, you can modify many of the fields on the Entitlement.

Note ▪ *You cannot edit the **System Entitlement ID** (the Producer Portal unique identifier for this entitlement) or the **Entitlement ID** you entered when you first created the entitlement because Producer Portal uses both of these values as key fields.*

You can create new lines and edit their line numbers but you can't change the line numbers for previously entered lines.

You also cannot change the email settings since the emails were already sent when you originally submitted the Entitlement.

With the exception of those listed above, you can edit all of the fields on the entitlement just as you did when you created the entitlement in the first place on the Entitle Account Page. When you click **Save** at the bottom of the form, the new values will replace the previous ones. In particular you can change the following properties:

Table 4-6 ▪ Entitlement Properties

Property	Description
Header information	The header information will be updated with the new information you provide, e.g., you can change the Purchase Order Number if your customer changes their purchase order
Catalog Item ID	Changing the Catalog Item ID changes the product which the account has access to by effectively canceling the old entitlement and creating a new one
Effective Date	By changing this date you can alter what versions of your product the account has access to. Moving the date backwards can give the account access to earlier versions, moving it forward can have the opposite effect, removing early versions of the product from the account
Expiration Date	The most common reason for changing the expiration date of an Entitlement line is to extend a maintenance agreement and continue letting the account receive updates. Conversely, by reducing the Expiration Date the you can keep the customer from getting future updates, or in the case of "time limited Catalog Items" from having further access to the product.
Quantity	This value only affects the user if the entitlement line item is for a “limited download Catalog Items”, in which case changing it will change the total number of downloads allowed. The specific behavior depends on the Catalog Item itself and on how many downloads have already occurred. If the line item is not for a “limited download Catalog Item” then quantity is just informational and can be changed with no effect.
Price	This is informational only and can be changed
License code	Changing this value will change the license key displayed to the user when he clicks the License Key tab or link on the Producer Portal site
Status	By changing the status from Active to Inactive you can effectively cancel the line item. Doing so will remove any access that was granted based on this entitlement line item. Changing the status from Inactive to Active has the reverse effect and restores access based on this line item.

If your company has specified any additional fields at the line item level, they can also be edited on the page.

You can also add additional line items to an entitlement the same way you do when creating an new entitlement.

View Transaction Page

On the **Edit Entitlement** page, select **View > View Transactions** to display all transactions for the entitlement. The **Search Results: Transactions page** opens.

Click on an individual System Transaction ID to view it on the **View Transactions** page.

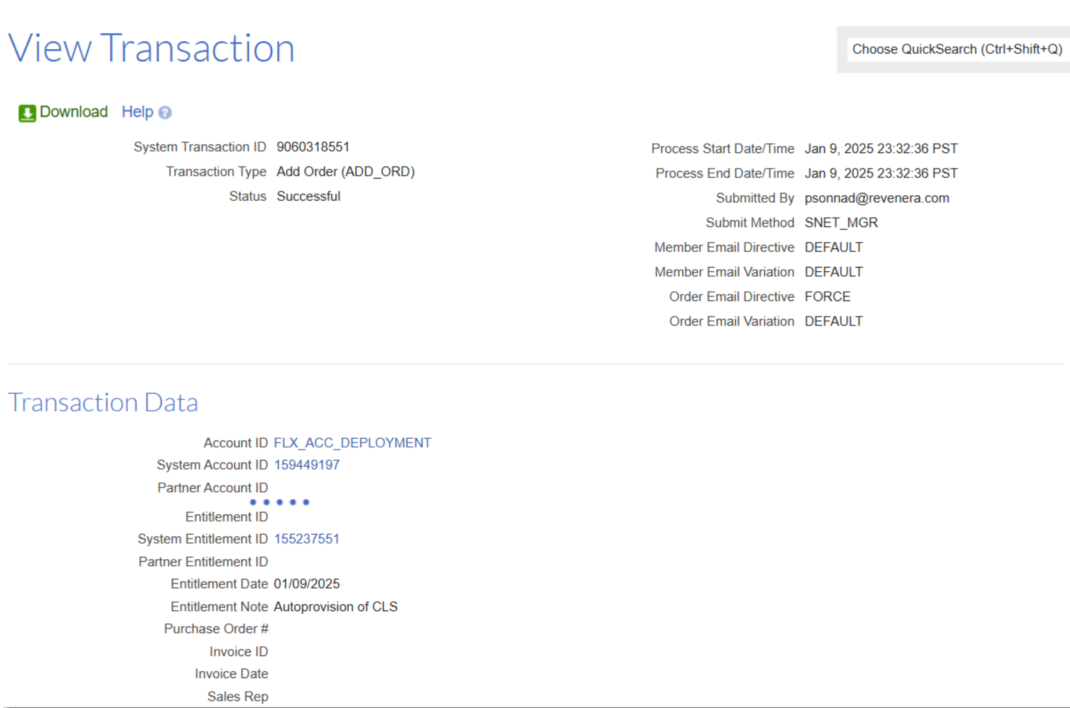


Figure 4-9: View Transaction

View Emails Page

On the **Edit Entitlement** page, select **View > View Emails** to display all Entitlement Notification emails sent regarding this entitlement.

Click on an individual System Email ID to view a particular email message.

If no Emails exist for the Entitlement, the system will display a status message to that effect.

Send Entitlement Notification Email Page

You can send, or resend, an Entitlement Notification Email from the **View Entitlement** page by selecting **Edit > Notify**. The **Send Entitlement Notification Email** page opens.

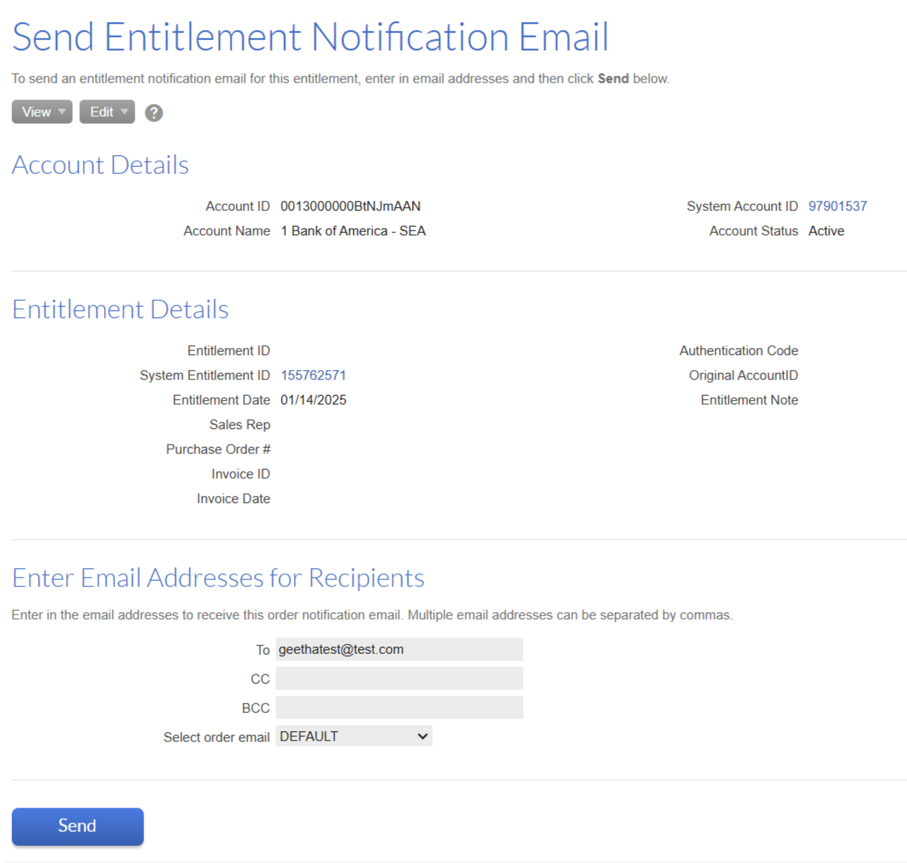


Figure 4-10: Send Entitlement Notification Email Page

On the **Send Entitlement Notification Email** page, you can enter one or more email addresses for each type of recipient (To:, CC:, BCC).

If one or more emails were already sent for this Entitlement, the **Send Entitlement Notification Email** page will be pre-populated with the email addresses of all member who have been sent Entitlement Notifications for this Entitlement.

5

Features

This chapter describes about the following features in FlexNet Operations LLM:

- Product Preferences
- Product Search
- Download Limited Functionality Summary
- Order History
- Bounced Email Handling
- Merge Accounts
- Email Template Options
- Standard Data Extract
- Custom Page Instructions Using Producer Portal HTML Content
- Password Token
- Order CDs
- Home Page
- Binary License File Support
- Localized Emails
- Single Sign-On Process

Product Preferences

FlexNet Operations LLM Members may not wish to view or receive emails for every product to which they are entitled. The Product Preference functionality allows Members to be able to set their own personal preference to block Update Notification emails and/or hide Catalog Item Product Lines from their view on the FlexNet Operations LLM site. Please contact your Account Manager / Project Manager if you have any questions or if you are interested in making Product Preferences available for Members.

Functionalities

The Product Preference functionality is optionally available as a link from the left navigation bar of the FlexNet Operations LLM End User Enterprise Portal. It is a personal preference and works in conjunction with the Email Preferences link, also on the left navigation.

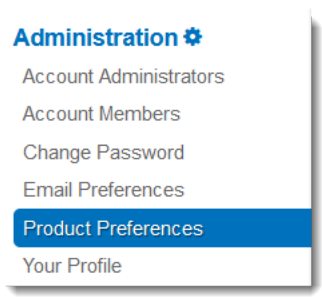


Figure 5-1: Product Preferences in End User Portal

Members may choose to opt out from receiving Update Notification emails by Catalog Item Product Line. Additionally, Members may choose to hide the navigation for a selected Catalog Item Product Line on their FlexNet Operations LLM site. When users elect to hide the navigation for a particular Catalog Item Product Line, by default, they will also be restricted from receiving Update Notification emails for that Catalog Item Product Line.

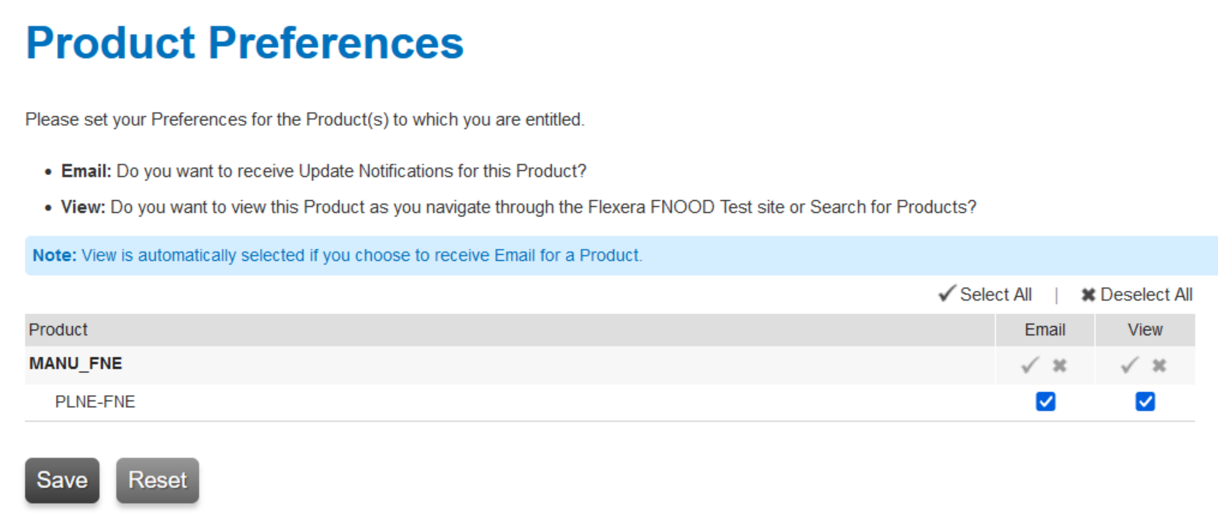


Figure 5-2: Product Preferences Page End User Portal

If the Member has Email Preferences set to not receive any emails, there is a message that appears above the choices to remind them that the Email Preferences have precedence over Product Preferences.

Once the **Save** button is clicked, a message is displayed if the end user has their Email Preference set not to send any emails.

If the Member has Email Preferences set to not receive any Update Notifications, there is a message that appears above the choices to remind them that the Email Preferences have precedence over Product Preferences.

Once the **Submit Product Preferences** is clicked, a message is displayed if the end user has their Email Preference set not to send any Update Notifications.

Customers who have FlexNet Operations LLM Producer Portal permissions to edit Member information can also edit Email Preferences and Product Preferences for the Member by utilizing the **Set Preferences**. This is available whether or not the Customer has elected to have the Product Preferences functionality available to Members on the FlexNet Operations LLM site. The following displays the FlexNet Operations LLM Producer Portal site:

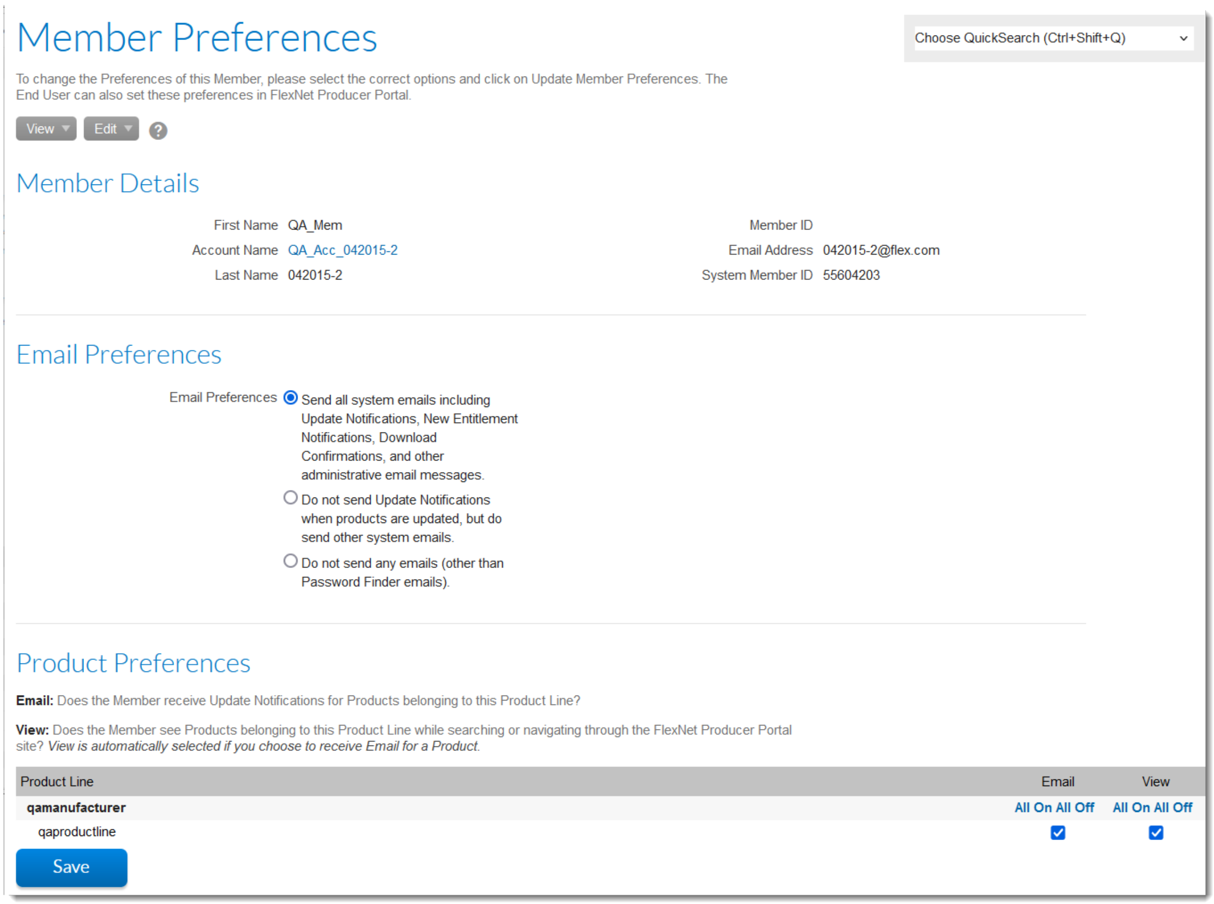


Figure 5-3: Member Preferences Page in FlexNet Operations LLM Producer Portal

Product Search

Product Search allows FlexNet Operations LLM Enterprise Portal users to locate Products or Files to which they are entitled without having to navigate through the product hierarchy.

This optional functionality can be added or removed from the site by scheduling with your Account Manager or Project Manager. When implemented, a link to the search page will be placed in the left-navigation bar. Users clicking on the link will be taken to a page with a search text box.

Product Search utilizes Lucene, which is open source software from Apache. Components of the search engine include an extraction from the FlexNet Operations LLM database (scheduled every hour), building and modifying the Index to include Account Entitlements and Product metadata, while allowing end users on the FlexNet Operations LLM Enterprise Portals to search the Index.

The following describes the functionalites of Product Search:

Basic Search Criteria

The Product Search functionality allows Enterprise Portal users to find Products and Files to which they are entitled, by using a familiar Internet-style search.

- Simply type a word or phrase in the text box and click the **Search** button.
- The search-term (also called “query”) will by default return results that will match ANY of the words entered (not ALL of the words).
- The search is not case-sensitive.

Advanced Search Criteria

The result set may be improved by using the following operators:

- Use double quotes to find an exact multi-word phrase.
- Use "+" before a term to require that a particular term be present. For example the criteria "+macintosh" will only find Products or Files that contain the term "macintosh".
- Use "*" as a wildcard in your search. It will match zero or more characters, and can be located anywhere in the word, except the beginning. This is particularly useful to search for part numbers or versions. For example the criteria "ABC*" will find terms "ABC", "ABC-123", "ABCDEF", etc.
- Use "AND" (in upper case) between words when you want to require that each of the words exists in the data that produces your results ("OR" is the default).
- Use "NOT" to exclude a word from being included in the data.
- Use "~" at the end of a search term to do a "fuzzy" search. For example the criteria "roam~" will find terms similar in spelling to "roam" like "foam" and "roams".

Search Fields

The criteria entered will be used to search through a data index that includes the following fields:

- Product ID
- Product Description
- Product Version
- Product Line
- File Name
- File Description

- Product and File Level User Defined Fields (UDFs), if implemented

Displayed Results

- The returned results will contain links to a list of Files (either directly or via the Product page) which you are able to download, as well as a description of the result and the date that the Product or File was made available. Additionally, each of the results is scored, based on the quantity and location of your criteria within the indexed data.
- Before performing the search, Enterprise Portal users can select how to sort the results: by Relevance (the default scoring based on the quantity and location of the criteria on the indexed data) or by Date. When sorting by Relevance, higher scores will be displayed first. When sorting by Date, more recently created Products (or Files) will be displayed first.

Download Limited Functionality Summary

In order to better support certain customer requests, FlexNet Operations LLM has been modified to support the ability to set a limit on the number of times an Account can download a file.

Due to the impact to the end users, this functionality is not recommended unless specifically warranted. In general, license keys or contractual agreements should control limited access to software. Please talk to your Revenera Account Manager or Project Manager before implementing.

- Functionality for 7.0.2 Release of Download Limited Functionality
- Scenarios

Functionality for 7.0.2 Release of Download Limited Functionality

Download limits are determined at the following three levels:

- **Entitlement**—The ability to set a limit on the number of times an Account can download a File is driven by that Account's entitlements. The limit is controlled by providing a value in the download limit attribute of the entitlement order line. Valid values are –1 or greater.

  A default for this attribute will be set at time of FlexNet Operations LLM service set up. If not specified, the default setting in the Producer Portal is blank. When the default is blank, then there is a Catalog Item attribute called default download limit that will be used. This default download limit will be pre-populated in The Producer Portal but may be overridden whenever entitlement transactions are processed.

  If there is no download limit value specified in the entitlement, the value from the Catalog Item attribute will be used.

  Note ▪ *Consider the following values for the download limit attribute:*

  - *"–1" represents unlimited downloads.*
  - *"0" represents zero downloads used in conjunction with the File attribute called ignore download limit, this could be used to grant access to certain files (like documentation) without giving access to others (like product binaries).*

    - *Values greater than "0" represent the maximum number of times that each file can be downloaded by an Account.*

- **Catalog Item**—The number of times an Account can download a File can also be determined by the Catalog Item attribute called default download limit.

  The default download limit attribute will be overridden by the download limit attribute of the order line if one is provided. The default is set to blank and unlimited.

- **File**—Identify which Catalog Items should have limited downloads and how many downloads are allowed.

  Changes to the Catalog Item default download limit do not affect existing entitlements. Whether an Account can have limited downloads for a File can also be determined by a File attribute called ignore download limit. This attribute indicates whether or not a download limit (set by the entitlement and/or Catalog Item) should be applied to a particular File. This is to allow for restricting the download of the product binary while allowing Files like documentation to be unlimited.

  The limit (if any) specified in the entitlement and/or Catalog Item will be applied to all associated Files where the ignore download limit attribute is set to "yes". The default for this attribute is "no" which means the File will accept the download limits as set in the entitlement and/or Catalog Item. Changes to the File ignore download limit attribute affect existing entitlements for that File.

  You are responsible for identifying which Files the download limitation should apply to. Edits to this attribute can be made at the Edit File List menu option under the Product menu in Product Management in the Producer Portal.

The FlexNet Operations LLM download page will not generate download links for any member on the Account for Files that have reached the download limit. A message indicating that the download limit has been reached will be displayed instead. The FTP link as well as the Advanced Download link will be disabled.

The FTP daemon and HTTPS download service will exclude Files that have reached the download limit from the directory hierarchy. In the case where the account has multiple entitlements to the same item, the entitlements will be cumulative - that is, the number of downloads that an account can perform will be the sum of the limits allowed by the individual entitlements. If the end user/account needs to download a File after the limit has been reached, a new entitlement must be processed.

***Note** ▪ Consider the following:*

- *Split Files downloads are currently not supported (e.g., image0001, image0002 option in Advanced Download page).*
- *Refresh download page upon successful download completion is not supported.*
- *If multiple downloads started prior to successful download, jobs in progress will not be terminated.*

Scenarios

There are following scenarios/conditions in which an account can download a file, based on the download limit attribute, default download limit, and ignore download limit inputs:

- **Entitlement unlimited/Catalog Item unlimited**—An account can have unlimited downloads due to the followings:
    - Download limit attribute on entitlement line item is either blank or –1

    - Default download limit attribute on Catalog Item is blank
    - File attribute ignore download limit setting is irrelevant—File has unlimited downloads.
- **Entitlement unlimited (attribute is blank)/Catalog Item limited**—An account can have both unlimited and limited downloads due to the followings:
    - Download limit attribute on entitlement line item is blank.
    - Default download limit attribute on Catalog Item has a value 0 or higher.
    - If File attribute ignore download limit is set to “yes”—File has unlimited downloads.
    - If File attribute ignore download limit is set to “no”—File is limited to the Catalog Item attribute setting.
- **Entitlement unlimited (attribute is -1)/Catalog Item limited**—An account can have unlimited downloads due to the followings:
    - Download limit attribute on entitlement line item is –1.
    - Default download limit attribute on Catalog Item has a value 0 or higher.
    - File attribute ignore download limit setting is irrelevant—File has unlimited downloads.
- **Entitlement limited/Catalog Item unlimited**—An account can have both unlimited and limited downloads due to the followings
    - Download limit attribute on entitlement line item is 0 or higher.
    - Default download limit attribute on Catalog Item is either blank or -1.
    - If File attribute ignore download limit is set to “yes”—File has unlimited downloads.
    - If File attribute ignore download limit is set to “no”—File is limited to entitlement attribute setting.
- **Entitlement limited/Catalog Item limited**—An account can have both unlimited and limited downloads due to the followings:
    - Download limit attribute on entitlement line item has a value 0 or higher.
    - Default download limit attribute on Catalog Item has a value 0 or higher.
    - If File attribute ignore download limit is set to “yes”—File has unlimited downloads.
    - If File attribute ignore download limit is set to “no”—File is limited to entitlement attribute setting.
- **If a download limit is exhausted by cumulative downloads by members of an Account**—When the download limit is reached, still the download can be intiate via:
    - A new entitlement could be processed to add more downloads for the Account
    - The original entitlement could be extended to have more downloads by increasing the value of the download limit attribute.

Order History

The Order History feature in FlexNet Operations LLM provides end users with an order based view of their entitlements. This view enables users to navigate to their products and download through the actual order that was placed for them rather than through the product names or families.

Order History Page Usage

If you choose to enable this feature, a link to Order History will be incorporated into the left-hand navigation bar on your site. Users clicking on the link will be taken to a page with the following text:

Table 5-1 ▪ Order History Page Text

Text Displayed	Description
Order History <from date>	The <from date> is not required but may be defined by your order system depending on accuracy of the order data.
Listed below are your orders. To view the details of a particular order, click on the order number. Canceled orders are not displayed.	• **If there are no orders**, **“No orders available for this account.”** is dispalyed. • **If there are orders**, the display lists the orders associated with the end user's account. This display includes: • Order Number (key) • PO Number • License Information link (if applicable) • Download Order link (if the feature is turned on for your implementation)
(Link to the license)	For manufacturers/products that deliver licenses through FlexNet Operations LLM, the order history page will also include a link to the license.
Link to **Order Detail** view	A drill-down is available for each order to an **Order Detail** view. This detail view shows each of the line items on the order including: • Line Number • Product Description • Manufacturer Part number • Qty • Download • License Information link (if applicable) • **Download Order** link (if the feature is turned on for your implementation)

Below are sample screenshots of the standard **Order History** and standard **Order Detail** pages. The text on these screenshots is standard but some of it can be customized. Contact your Revenera Account Manager or Project Manager if you would like to implement these pages on your site and/or to discuss any customization requests to see if they are feasible.

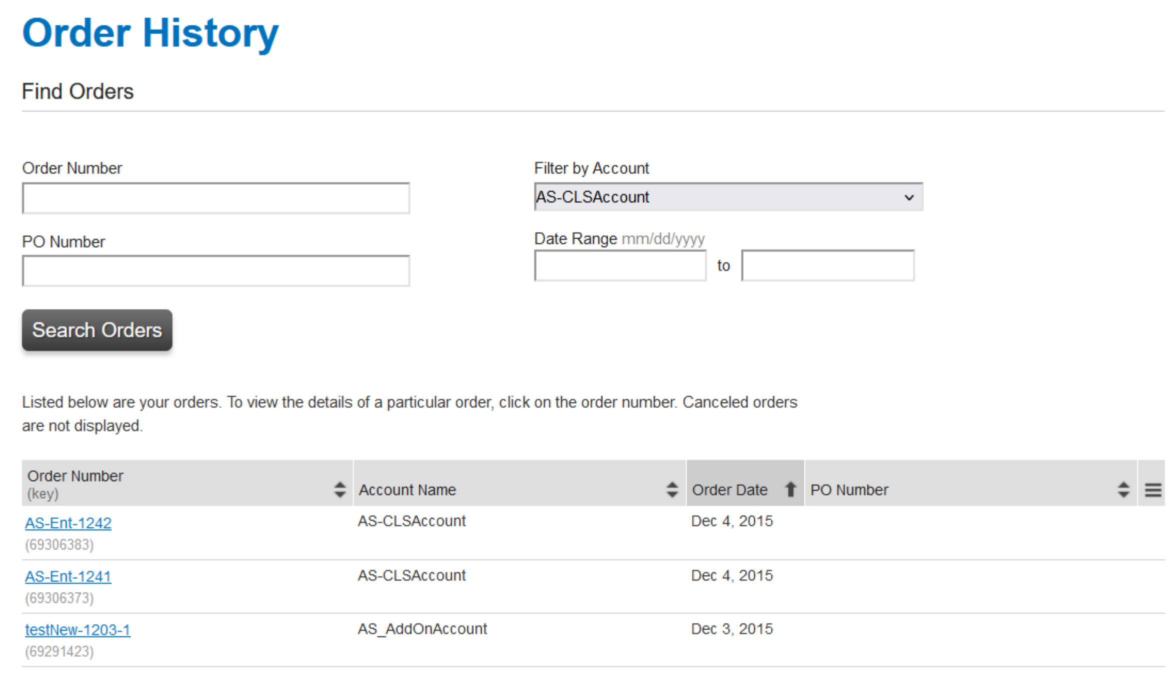


Figure 5-4: Standard Order History Page

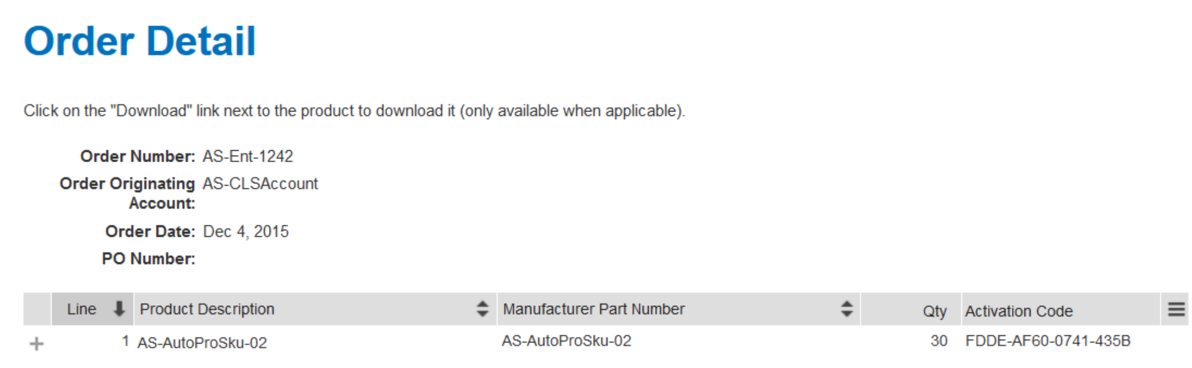


Figure 5-5: Standard Order Detail Page

***Note** ▪ Order history information is updated at 8:00 am, 12:00 pm, 4:00 pm and 12:00 am each day.*

Bounced Email Handling

The bounced email information that is available in FlexNet Operations LLM Producer Portal and Reporter relies on the DSN (delivery status notification) convention. Both DSN and non-DSN email bounces are captured by FlexNet Operations LLM. When the mail server used by FlexNet Operations LLM end users has DSN enabled, FlexNet Operations LLM is able to track and report whether the email was received or not, as well as the cause provided for any bounces. Unfortunately, not all mail servers support DSN, and often mail system administrators disable this service even if DSN is supported by the mail server.

Bounced email information is available in the following formats:

- **Reporter**—DSN bounces are captured in two reports: Bounced Email Detailed or Bounced Email Summary.
- **Producer Portal**—Users can view non-DSN bounced email messages and acknowledge that they've reviewed the bounce (in the way failed transactions are acknowledged) using the View Bounced Email screen.
- **Message Forwarding**—Your FlexNet Operations LLM service can be configured so that all non-DSN email bounces are forwarded to a designated email alias.

The **Email Sent Status** is based on DSN responses Revenera receives:

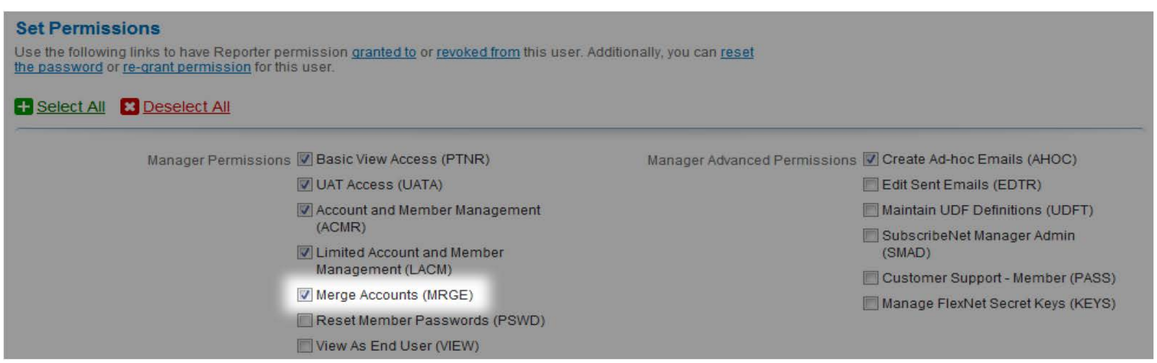
- **Unsent**—Email was not sent from the Revenera email servers due to email preference setting for the end user or if the email is queued to be mailed in the future.
- **Sent/Unconfirmed**—The Revenera email servers sent the email and have not received a DSN response indicating the email was delivered.
- **Sent/Confirmed**—The Revenera email servers sent the email and received a DSN response indicating the email was delivered to the user's mailbox.
- **Sent/Failed**—The Revenera email servers sent the email and have received a DSN response indicating the email was not delivered to the user's mailbox.

Merge Accounts

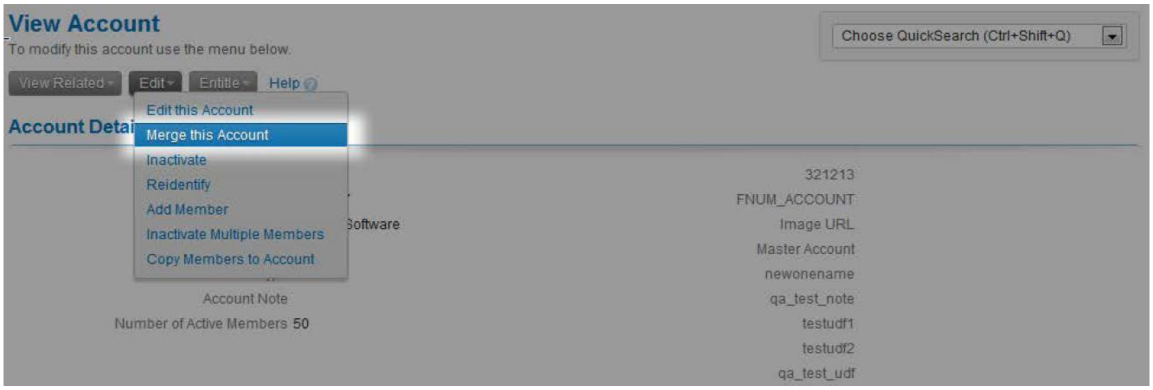
FlexNet Operations LLM Producer Portal users can merge Accounts within The Producer Portal. This document describes how to enable this functionality for Producer Portal users and the process to merge accounts.

Task ***To enable merge accounts functionality for a user:***

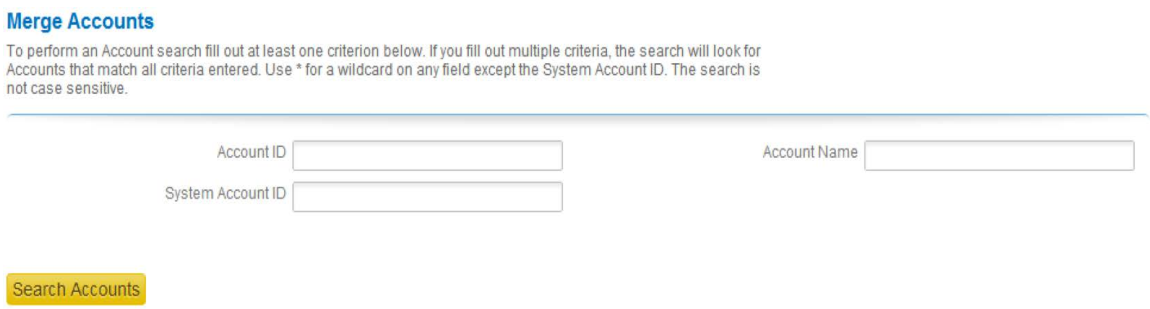
1. Assign the **Merge Accounts** permission to the appropriate Producer Portal users as displayed below:



2. Upon locating the Account that you would like to merge, select the **Merge this Account** option from the **Edit** menu as shown below:

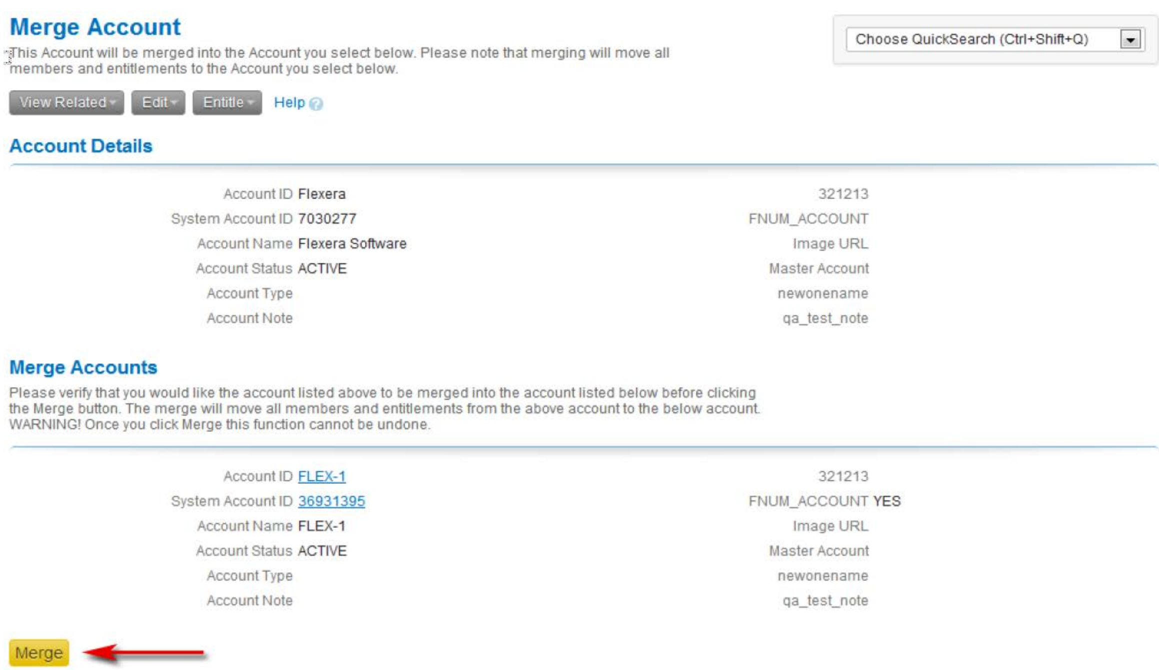


3. On the **Merge Accounts** page, search for the existing Account into which you would like to merge this Account. The following displays the **Merge Account** page:



This will open a new window and allow you to select the appropriate Account.

4. Once the Account has been selected, press the **Merge** button as shown below:



5. After pressing the **Merge** button, the Members and Entitlements belonging to the Account at the top of the screen will be associated with the Account at the bottom of the screen.

If you need to retain the first Account's ID for reporting purposes, please contact your Account Manager or Project Manager prior to merging any Accounts. We can assist you by adding an Account-level UDF to The Producer Portal which will enable you to still search for the first Account and also to process transactions against it.

Email Template Options

Customers that allow Account Administrators to add users from the FlexNet Operations LLM site may prefer to use a different email template than the standard Welcome Email and/or Cancel Member Email templates available today.

By default, there is only one template each for Welcome and Cancel Member Emails. Both of these are triggered by adding or inactivating a member either via the FlexNet Operations LLM site or via The Producer Portal.

Your site can be set up to use a separate Welcome Email template and/or Cancel Member Email template if the Member was added or inactivated by an Account Administrator from the FlexNet Operations LLM site.

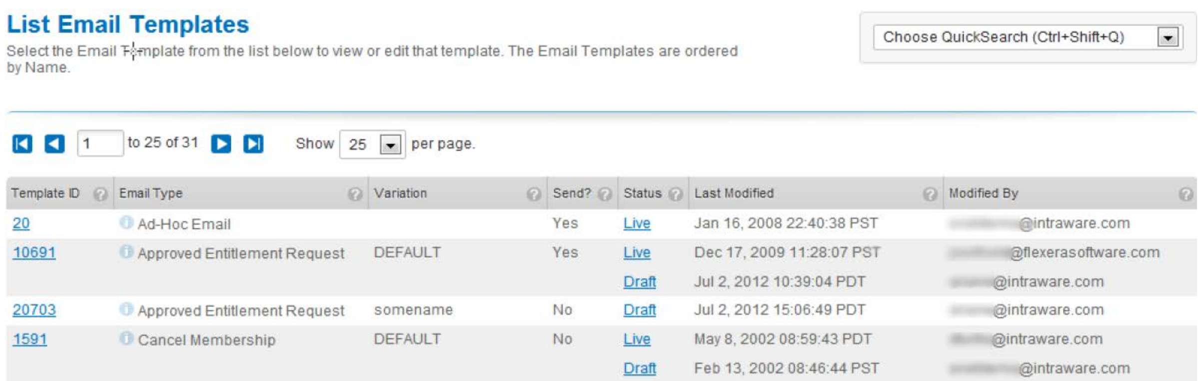


Figure 5-6: List Email Templates Page

Contact your Revenera Account Manager or Project Manager to implement this option.

Standard Data Extract

FlexNet Operations LLM data can be integrated into customer systems using standard or custom data extracts. Below are specifications for the standard data extracts available. If you need a customized data extract, please contact your Revenera Account Manager or Project Manager for assistance.

- Overview of Data Extract Files
- Download Activity Data Fields
- License Activity Data Fields
- Member Activity Data Fields
- Entitlement Activity Data Fields
- Account Activity Data Fields

Overview of Data Extract Files

The following are the available standard data extract files:

- **Download Activity**—Completed downloads.
- **License Activity**—New and updated Licenses.
- **Account Activity**—New and updated Accounts.
- **Member Activity**—New and updated Members.
- **Entitlement Activity**—New and updated Entitlements.

***Note** ▪ Account, Member, and Entitlement Activity extracts are generally more appropriate for self registration sites such as an evaluation Try Before You Buy (TBYB) site integrated with a CRM system.*

Revenera generates data extract files for the previous day after midnight Pacific Time. The files are posted on a password-protected FTP server and are automatically removed after 30 days.

Other criteria include:

- The extract is generated in a pipe-delimited format
  - Fields are separated by the "pipe" character ("|")
  - Lines are separated by a CR/LF.
  - Trailer records are not included in the file.
  - A header record for the pipe delimited version is optional.
- An alternate XML formatted version is also available.
- Date fields are in a mm/dd/yyyy format.
- The filename is in this format:

```
XML:  <PartnerCode>_DownloadActivity_yyyymmdd.xml
TEXT: <PartnerCode>_DownloadActivity_yyyymmdd.txt
```

The `PartnerCode` value and FTP server connection information can be provided by your Revenera Account Manager or Project Manager.

Download Activity Data Fields

The following table represents the data fields and data types for Download activity:

Table 5-2 ▪ Download Activity Data Fields

Download Activity Data Field	Data Type
IntrawareDownloadID	INTEGER
DownloadType	CHAR(4)

Table 5-2 ▪ Download Activity Data Fields

Download Activity Data Field	Data Type
StartDateTime	DATETIME YEAR TO SECOND
EndDateTime	DATETIME YEAR TO SECOND
DurationSeconds	INTEGER
DownloadIPAddress	CHAR(15)
IPAddressCountry	CHAR(3)
Account / IntrawareAccountID	CHAR(15)
Account / AccountID	VARCHAR(100)
Account / AccountName	VARCHAR(100)
Member / IntrawareMemberID	INTEGER
Member / MemberID	CHAR(100)
Member / LastName	VARCHAR(30)
Member / FirstName	VARCHAR(30)
Member / Email	CHAR(100)
Member / Country	CHAR(3)
Order / IntrawareOrderID	INTEGER
Order / OrderID	VARCHAR(100)
Order / OrderDate	DATE
CatalogItem / IntrawareCatalogItemID	INTEGER
CatalogItem / CatalogItemID	CHAR(40)
CatalogItem / CatalogItemName	VARCHAR(255)
Product / IntrawareProductID	INTEGER
Product / ProductID	CHAR(40)
Product / ProductName	VARCHAR(255)
File / IntrawareFileID	INTEGER

Table 5-2 ▪ Download Activity Data Fields

Download Activity Data Field	Data Type
File / FileID	CHAR(40)
File / FileName	VARCHAR(255)

License Activity Data Fields

The following table represents the data fields and data types for License activity:

Table 5-3 ▪ License Activity Data Fields

License Activity Data Field	Data Type
IntrawareLicenseID	INTEGER
LicenseGroupID	VARCHAR(40)
LicenseGroupName	VARCHAR(100)
Account / IntrawareAccountID	CHAR(15)
Account / AccountID	VARCHAR(100)
Account / AccountName	VARCHAR(100)
Order / IntrawareOrderID	INTEGER
Order / OrderID	VARCHAR(100)
Order / PurchaseOrderID	VARCHAR(50)
Order / OrderDate	DATE
Order / LineNumber	INT8
CatalogItem / IntrawareCatalogItemID	INTEGER
CatalogItem / CatalogItemID	CHAR(40)
CatalogItem / CatalogName	VARCHAR(255)
CatalogItem / ProductLine / IntrawareProductLineID	INTEGER
CatalogItem / ProductLine / ProductLineID	CHAR(30)
CatalogItem / ProductLine / ProductLineName	CHAR(100)

Table 5-3 ▪ License Activity Data Fields

License Activity Data Field	Data Type
LicenseCode	CHAR(3000)
LicenseFileName	VARCHAR(255)
GeneratedDateTime	DATETIME YEAR TO SECOND
GeneratedByEmail	CHAR(100)
ReturnedDateTime	DATETIME YEAR TO SECOND
ReturnedByEmail	CHAR(100)
UpgradedDateTime	DATETIME YEAR TO SECOND
UpgradedEmail	CHAR(100)
Status	CHAR(20)
CreateDateTime	DATETIME YEAR TO SECOND
LastUpdateDateTime	DATETIME YEAR TO SECOND

Member Activity Data Fields

The following table represents the data fields and data types for Member activity:

Table 5-4 ▪ Member Activity Data Fields

Member Activity Data Field	Data Type
Account /IntrawareAccountID	VARCHAR(15)
Account / AccountID	VARCHAR(100)
Account / AccountName	VARCHAR(100)
IntrawareMemberID	INTEGER
MemberID	CHAR(100)
Email	CHAR(100)
FirstName	VARCHAR(30)
LastName	VARCHAR(30)

Table 5-4 ▪ Member Activity Data Fields

Member Activity Data Field	Data Type
JobTitle	VARCHAR(30)
Phone	VARCHAR(30)
Fax	VARCHAR(30)
AddressLine 1	VARCHAR(100)
AddressLine 2	VARCHAR(100)
AddressLine 3	VARCHAR(100)
AddressLine4	VARCHAR(100)
City	VARCHAR(40)
State	CHAR(2)
PostalCode	VARCHAR(15)
Country	CHAR(3)
AdminPrivilege	CHAR(1)
DownloadPrivilege	CHAR(1)
MemberNote	VARCHAR(255)
ExpirationDate	DATE
UserDefinedField	CHAR(255)
CreateDateTime	DATETIME YEAR TO SECOND
LastUpdateDateTime	DATETIME YEAR TO SECOND

Entitlement Activity Data Fields

The following table represents the data fields and data types for Entitlement activity:

Table 5-5 ▪ Entitlement Activity Data Fields

Entitlement Activity Data Field	Data Type
OrderID	VARCHAR(100)

Table 5-5 ▪ Entitlement Activity Data Fields

Entitlement Activity Data Field	Data Type
IntrawareOrderID	INTEGER
OrderDate	DATE
PurchaseOrderID	VARCHAR(50)
SalesRep	VARCHAR(50)
InvoiceID	VARCHAR(25)
InvoiceDate	DATE
LineItem / LineNumber	INT8
LineItem / TemporaryOrderLine	CHAR(1)
LineItem / Price	MONEY(16,2)
LineItem / SKU	CHAR(40)
LineItem /IntrawareCatalogItemID	INTEGER
LineItem / EffectiveDate	DATE
LineItem / ExpirationDate	DATE
LineItem / Quantity	INTEGER
LineItem / DownloadLimit	INTEGER
LineItem / Status	CHAR(20)
LineItem / UserDefinedField	CHAR(255)
OrderNote	VARCHAR(255)
UserDefinedField	CHAR(255)
TO	CHAR(5000)
Account / IntrawareAccountID	CHAR(15)
Account / AccountID	VARCHAR(100)
Account / AccountName	VARCHAR(100)
CreateDateTime	DATETIME YEAR TO SECOND

Table 5-5 ▪ Entitlement Activity Data Fields

Entitlement Activity Data Field	Data Type
LastUpdateDateTime	DATETIME YEAR TO SECOND

Account Activity Data Fields

The following table represents the data fields and data types for Account activity:

Table 5-6 ▪ Account Activity Data Fields

Account Activity Data Field	Data Type
AccountID	VARCHAR(100)
IntrawareAccountID	VARCHAR(15)
AccountName	VARCHAR(100)
AccountNote	VARCHAR(255)
Status	CHAR(20)
UserDefinedField	CHAR(255)
CreateDateTime	DATETIME YEAR TO SECOND
LastUpdateDateTime	DATETIME YEAR TO SECOND

Custom Page Instructions Using Producer Portal HTML Content

Customers can modify the site page instructions (typically the content on top of the page just underneath the Page Title) by using the HTML Content functionality in Producer Portal application. This document describes how to enable this functionality for the Producer Portal users and the process to set up the custom HTML Content.

- Assigning Maintain HTML Content Permission
- Adding HTML Content
- Pages Supported for Custom HTML Content
- Page Locations for HTML Content
- Additional Pages Supported for Custom HTML Content

Assigning Maintain HTML Content Permission

To enable this functionality, a Producer Portal Administrator must first assign the **Maintain HTML Content (DOCS)** permission to the appropriate Producer Portal users as shown in the following:

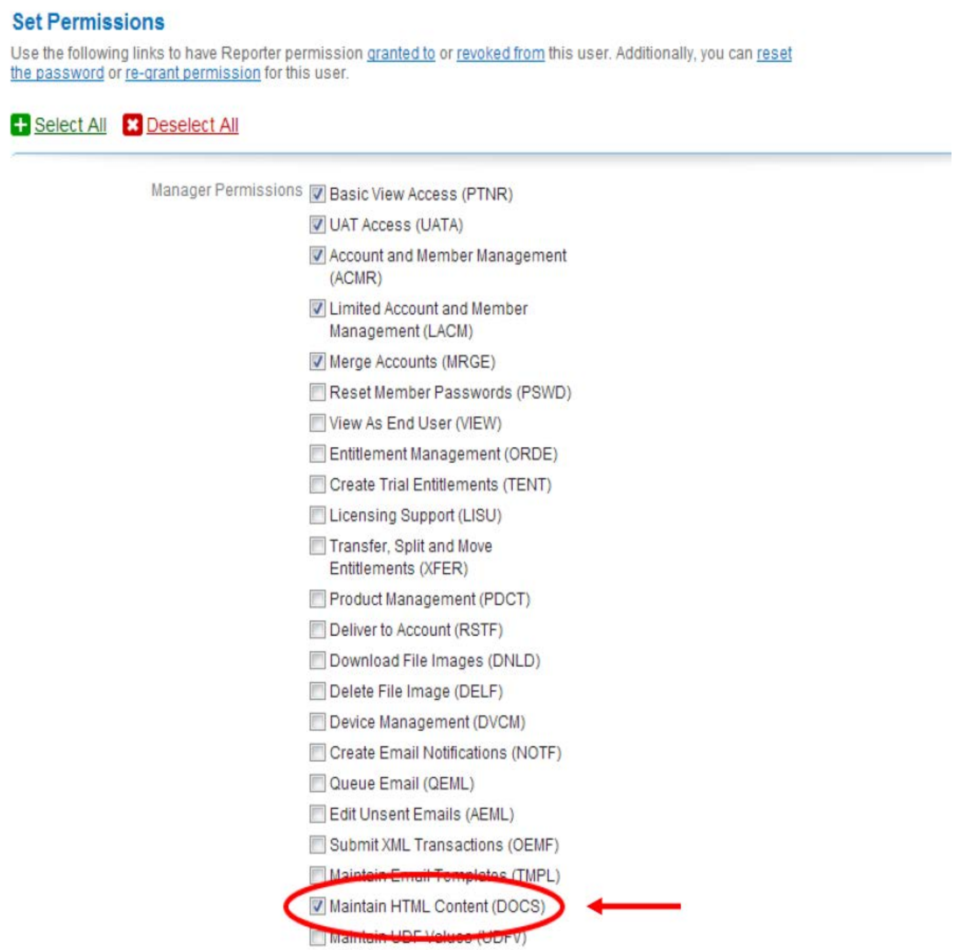


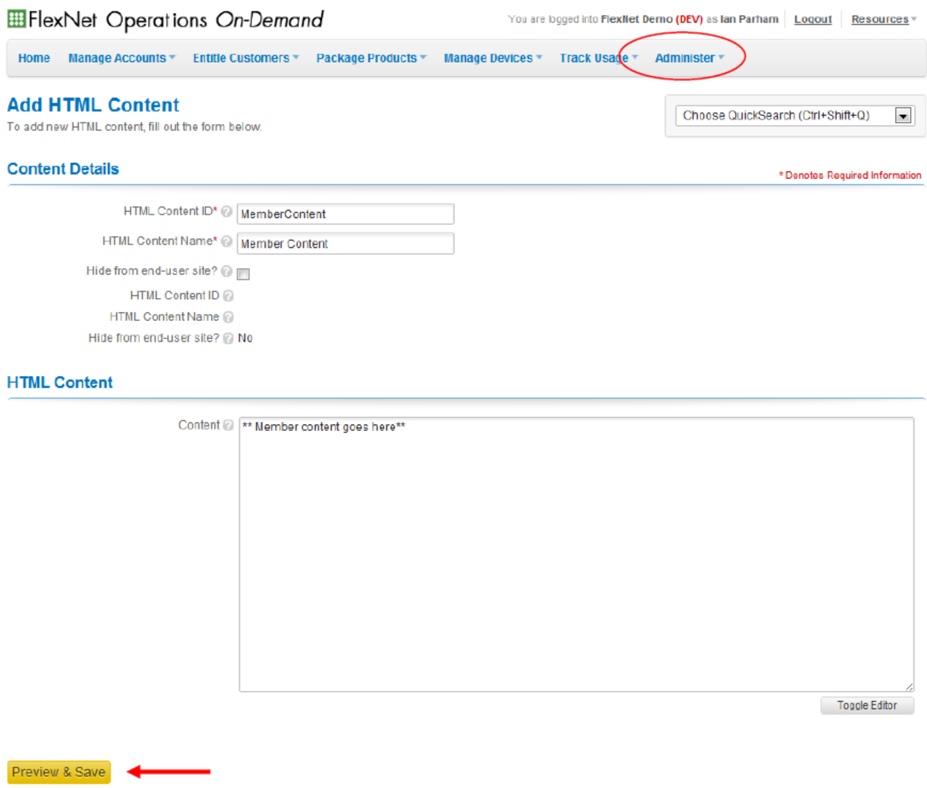
Figure 5-7: Maintain HTML Content (DOCS) Permission

Adding HTML Content

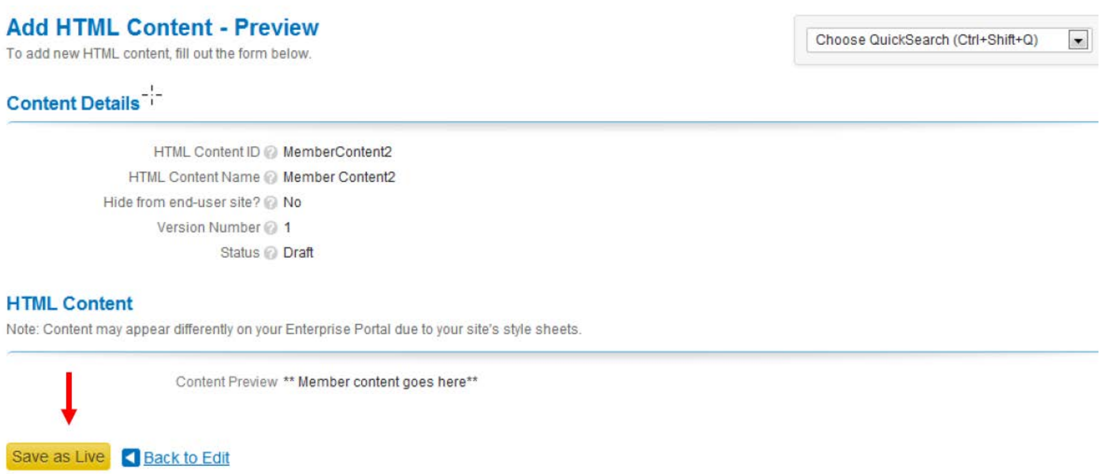
The Producer Portal user with the **Maintain HTML Content (DOCS)** permission will have the ability to add HTML Content pages following the steps below:

Task ***To add the HTML content pages:***

1. Login to Producer Portal and Select the **Add HTML Content** option on the **Administer** menu.
2. Create a document with the appropriate HTML Content ID. The pages that are supported are listed below and in Additional Pages Supported for Custom HTML Content. Click on the **Preview & Save** tab as indicated in the following:



3. After reviewing the content, click on the **Save as Live** tab to save the content or **Back to Edit** link to continue making changes.



4. After you click the **Save as Live** tab, view the corresponding page on the end user site to verify the change. Note that the custom instructions will replace, not append, any existing instructions on the page.

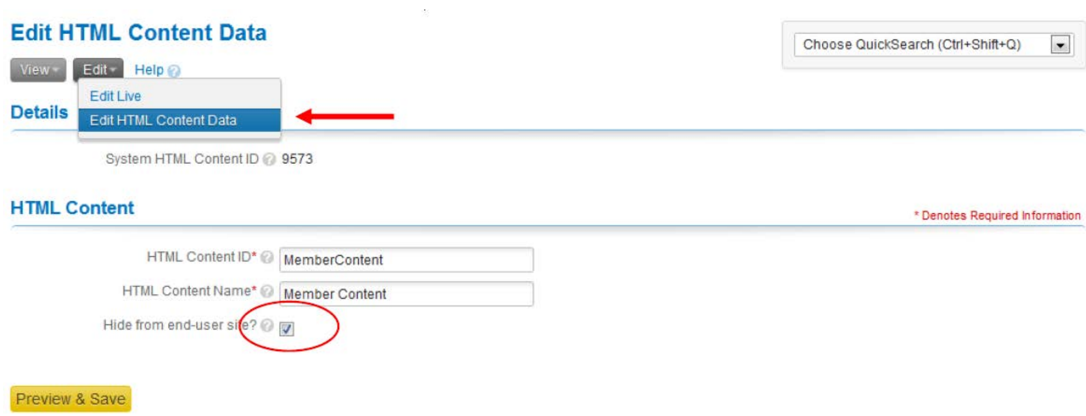
Notes Regarding Adding Custom HTML Content

Consider the following while using the Producer Portal application:

- **Localized Sites**—To update page instructions for localized sites, you will need to create documents with a locale suffix in the HTML Content ID. For example, the login page instructions are stored in HTML Content ID

`LoginContent` for English sites. The login page instructions for a French site would be reside in a document with an ID of `LoginContent-fr`.

- **Turning Off**—To revert page instructions back to the standard property driven content, the ‘Hide’ indicator on the document can be enabled. Under the Producer Portal Administer menu, select the HTML Content page you wish to edit and from the menu, select **Edit** > **Edit HTML** Content Data and select the Hide from end-user site?” field:



- **Replacing standard content with nothing**—An empty HTML Content document will not replace the existing standard content with nothing. To remove the standard page instructions, the HTML Content document should include only an HTML comment which is not visible on the end user site. Example: <!-- -->
- **Troubleshooting**—To facilitate troubleshooting, the content stored in the document will have HTML comments pre-pended and appended during the display process. These comments are viewable using View Source on the page where the content is displayed. The comments are of the form:

```
<!-- BEGIN HTMLContentID xxxx -->
```

  and

```
<!--END HTMLContentID xxxx -->
```

  where xxxx is the Intraware Content ID

Please contact your Client Relations or Project Manager if you have any questions

Pages Supported for Custom HTML Content

The following table lists pages supported for custom HTML content.:

Table 5-7 • Supported Page

Page Name	HTML Content ID	Notes
Account Users	MembersContent	Displayed on the Account Members page to non- Administrative users who are not allowed to add or modify other Members.
	MembersAdminContent	Displayed on the Account Members page to Administrators who are allowed to add or modify other Members.
Account Administrators	AdministratorsContent	Displayed above the list of Administrators.
Download	DownloadContent	Displayed on the Download page. ***Note •*** *Product specific content is still maintained via the Product 'Download Instructions' attribute.*
Download Help	DownloadHelp	Displayed on the Download Help link from the site left navigation for additional help to troubleshoot download issues.
Download Order	DownloadOrderContent	Displayed on the Download Order page.
Download Preferences	DownloadPrefContent	Displayed on the Download Preferences page.
FAQ	FAQ	Displayed when clicking on the Frequently Asked Questions (FAQ) link on the left navigation.

Table 5-7 ▪ Supported Page

Page Name	HTML Content ID	Notes
Index (Product List)	ManufacturersContent	Displayed when the user is presented with a list of Manufacturers. If only one Manufacturer is available, the user will be forwarded to the list of available Product Lines.
	ProductSuiteContent	Displayed when the Catalog Item Product Line selected contains Products that span multiple Product Product Lines. The user is presented with a list of child Product Lines from which to choose.
	ProductLinesContent	Displayed after the user has selected a Manufacturer (or the Manufacturer list page is bypassed) and the user has selected a Catalog Item Product Line (or the Catalog Item Product Line page is bypassed).
Login	LoginContent	Displayed above the username/ password input fields on the Login page.
	LoginLowerContent	Displayed below the username/ password fields on the Login page.
Offline Activation	OfflineActivationContent	Displayed on the Offline Activation page.
Order	OrderContent	Displayed on the Order Detail page.
Order History	PurchasesContent	Displayed on the Order History page.

Table 5-7 ▪ Supported Page

Page Name	HTML Content ID	Notes
Product (Product Information)	ReleaseNewTabSoloContent	Displayed when the Product Line selected contains no archived Products (only current Products).
	ReleaseNewTabActiveContent	Displayed when the current Product tab option is selected by the user and there are archive Products available for the Product Line selected.
	ReleaseArchiveTabSoloContent	Displayed when the Product Line selected contains no current Products (only archive Products).
	ReleaseArchiveTabActiveContent	Displayed when the archive Products tab option is selected by the user and there arecurrent Products available for the Product Line selected.
Profile	MemberAddContent	Displayed when an Administrator is adding a new Member.
	MemberUpdateContent	Displayed when updating Member information.
Search	SearchContent	Displayed on the Product Search page.
Support	Support	Displayed in the support section of the User Manual and includes download support and technical contact information, often linked from the site login page.
Switch Account	SelectAccountContent	Displayed when a Member is on more than one Account and must select from the list of Accounts after login to the end user site.
User Manual	UserManual	Displayed on the User Manual table of contents and subsequent sections.

***Note ▪** All pages are not available on all sites. Contact your Client Relations or Project Manager if you have questions about your implementation. Less frequently used pages are included in Additional Pages Supported for Custom HTML Content.*

Page Locations for HTML Content

This section lists the page locations for custom HTML content:

- MembersContent
- MembersAdminContent
- AdministratorsContent
- DownloadContent
- DownloadOrderContent
- DownloadPrefContent
- FAQ, User's Manual, Support, and Download Help
- Manufacturers Content
- ProductSuiteContent
- ProductLinesContent
- LoginContent and LoginLowerContent
- OrderContent
- ReleaseNewTabSoloContent
- ReleaseNewTabActiveContent
- ReleaseArchiveTabSoloContent
- ReleaseArchiveTabActiveContent
- MemberAddContent
- MemberUpdateContent
- PurchasesContent
- SearchContent
- SelectAccountContent

MembersContent

The following displays the Page for the **MembersContent**:

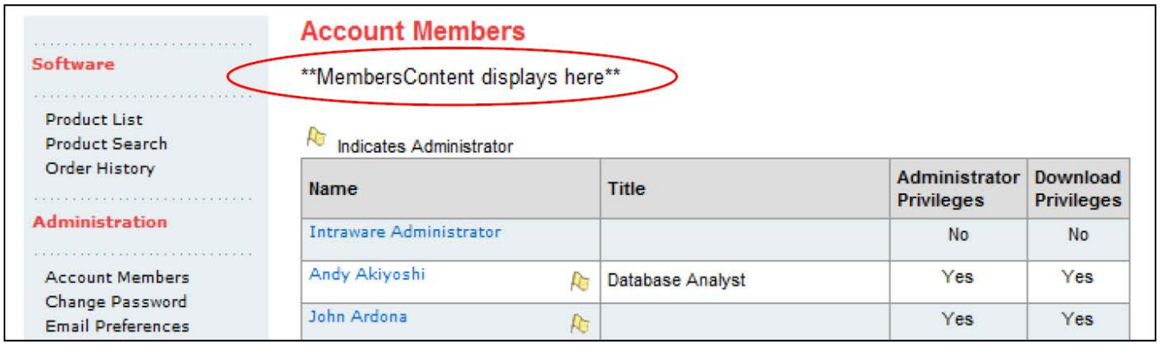


Figure 5-8: MembersContent

MembersAdminContent

The following displays the Page for the **MembersAdminContent**:

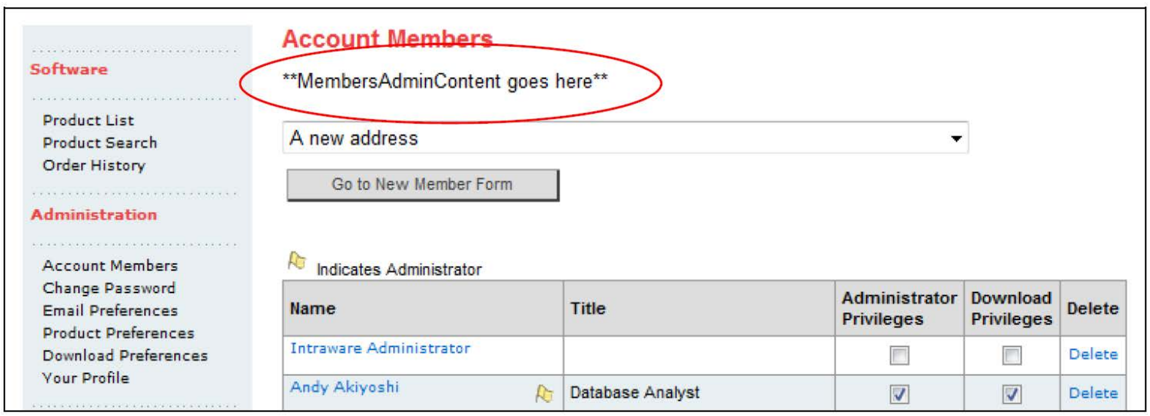


Figure 5-9: MembersAdminContent

AdministratorsContent

The following displays the Page for the **AdministratorsContent**:

Figure 5-10: AdministratorsContent

DownloadContent

The following displays the Page for the **DownloadContent**:

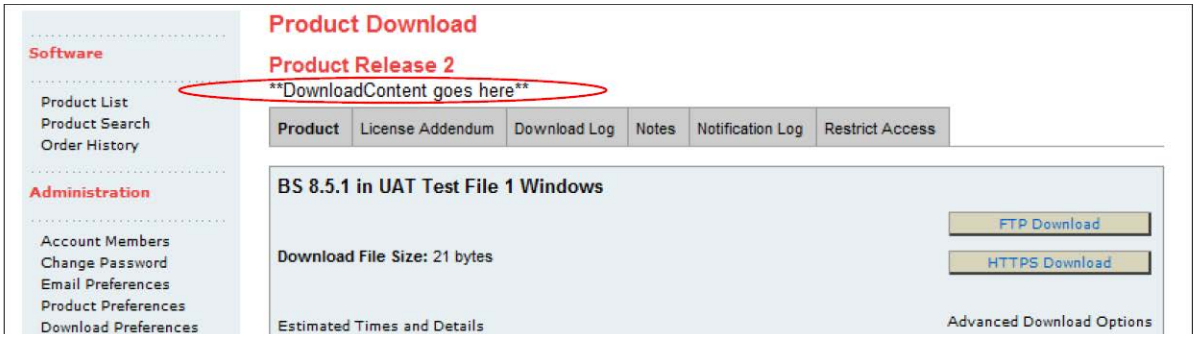


Figure 5-11: DownloadContent

DownloadOrderContent

The following displays the Page for the **DownloadOrderContent**:

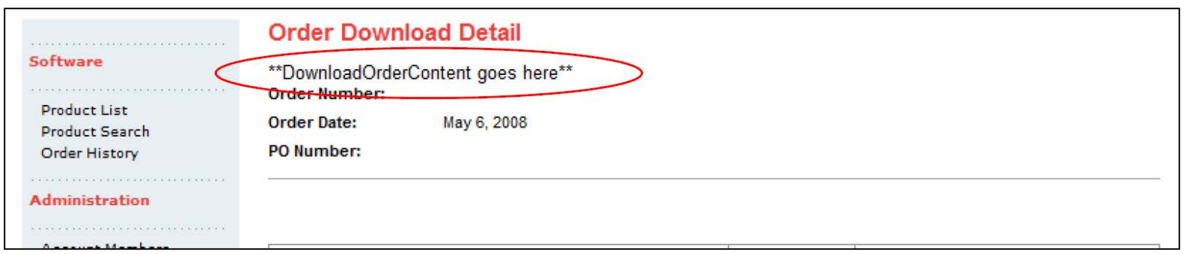


Figure 5-12: DownloadOrderContent

DownloadPrefContent

The following displays the Page for the **DownloadPrefContent**:

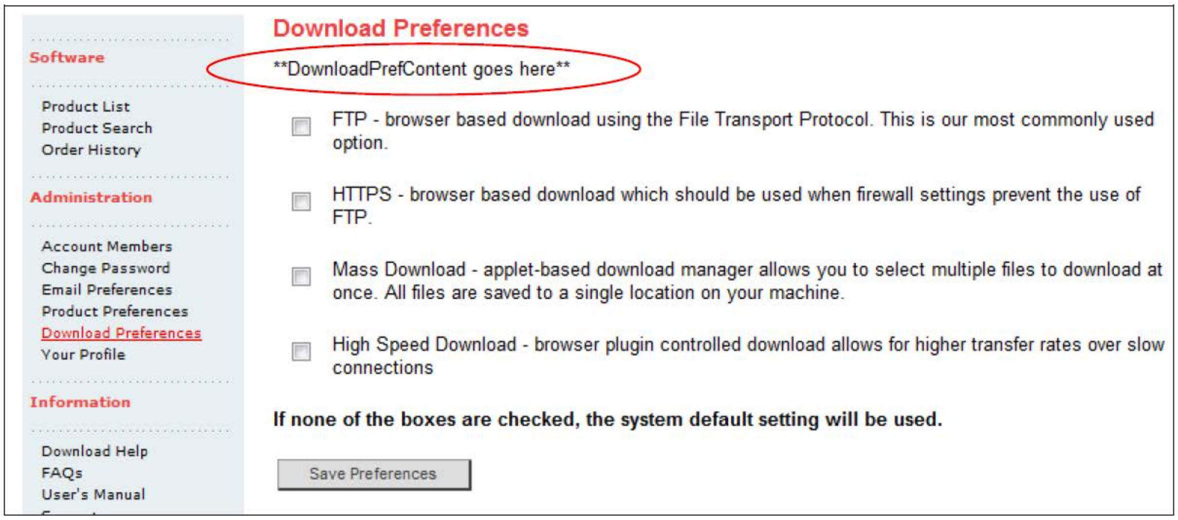


Figure 5-13: DownloadPrefContent

FAQ, User's Manual, Support, and Download Help

The following displays the Page for the **FAQ**, **User's Manual**, **Support** and **Download Help**:

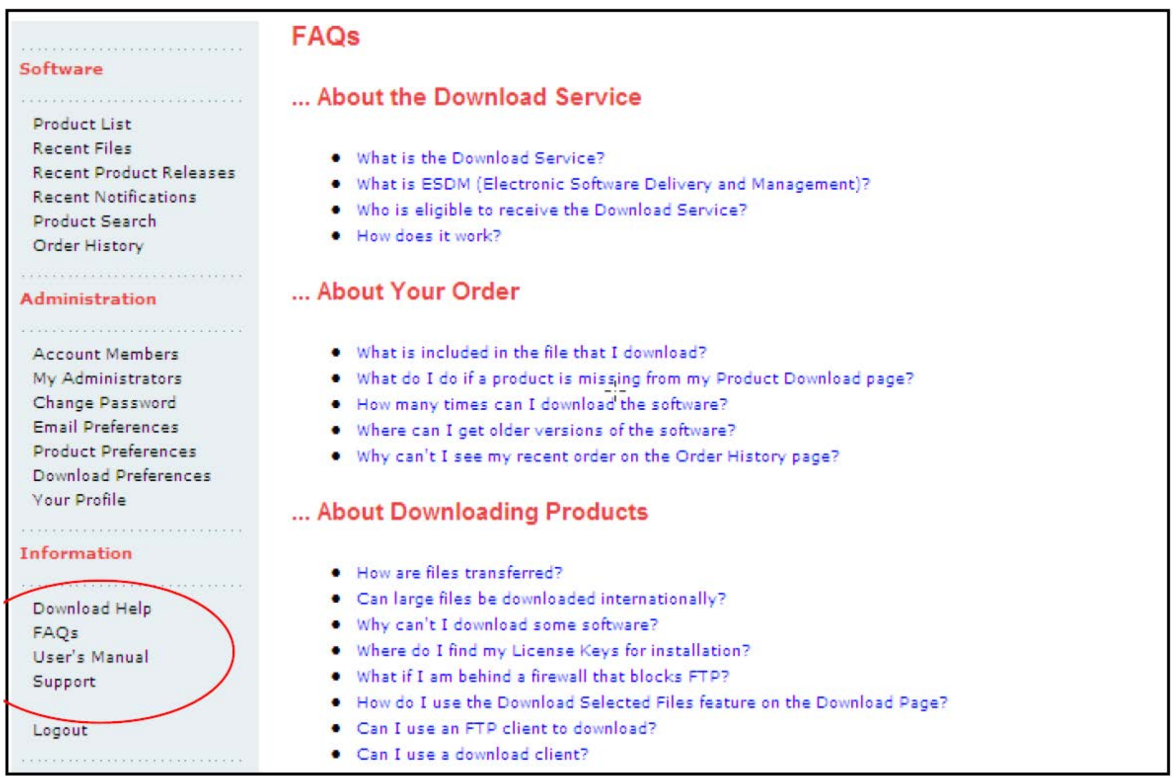


Figure 5-14: FAQ, User's Manual, Support and Download Help

Manufacturers Content

The following displays the Page for the **ManufacturersContent**:

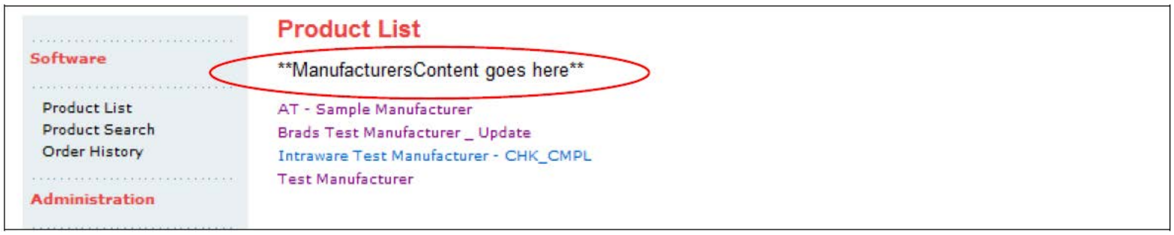


Figure 5-15: ManufacturersContent

ProductSuiteContent

The following displays the Page for the **ProductSuiteContent**:

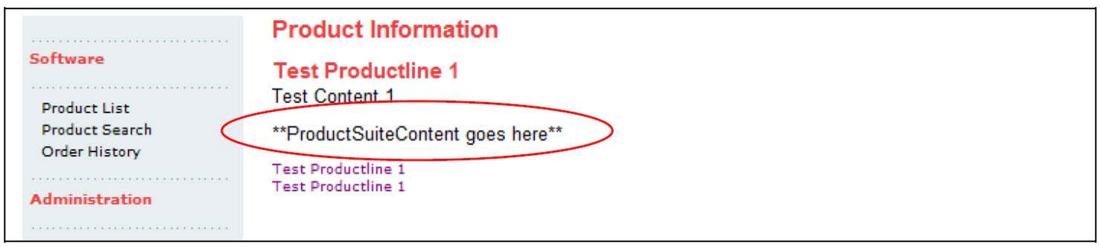


Figure 5-16: ProductSuiteContent

ProductLinesContent

The following displays the Page for the **ProductLinesContent**:

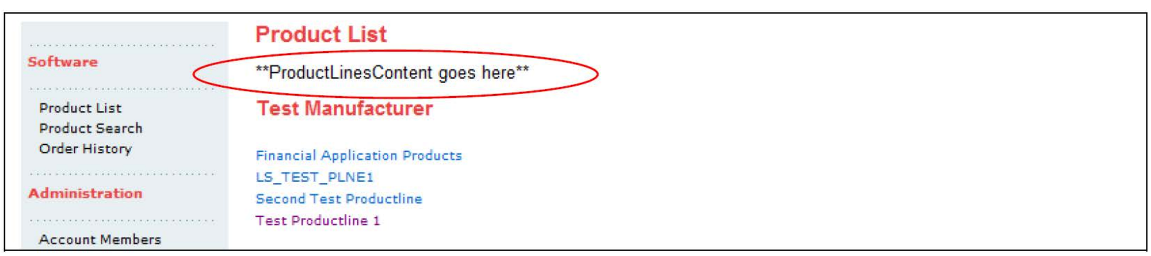


Figure 5-17: ProductLinesContent

LoginContent and LoginLowerContent

The following displays the Page for the **LoginContent** and **LoginLowerContent**:

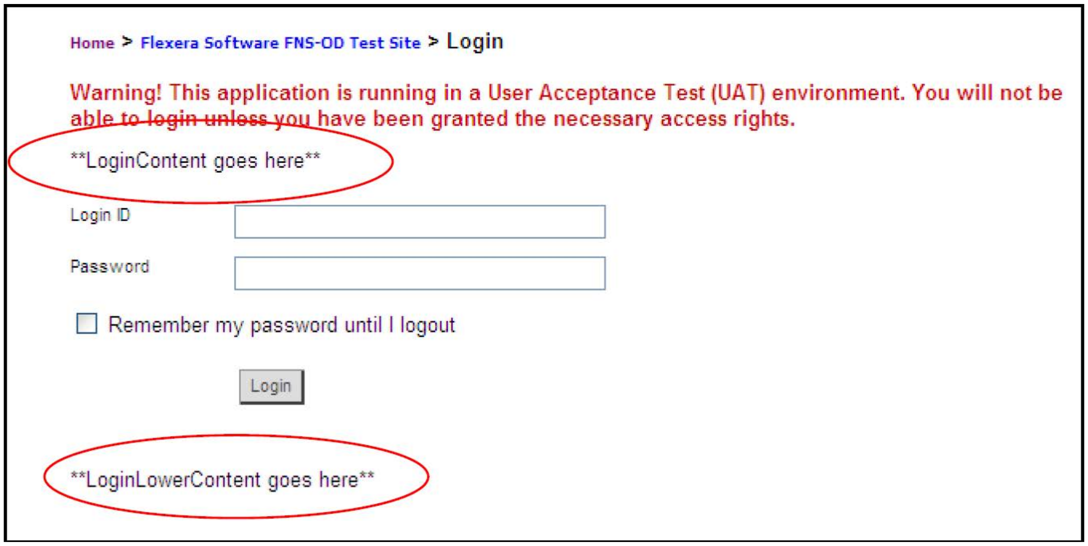


Figure 5-18: LoginContent and LoginLowerContent

OrderContent

The following displays the Page for the **OrderContent**:

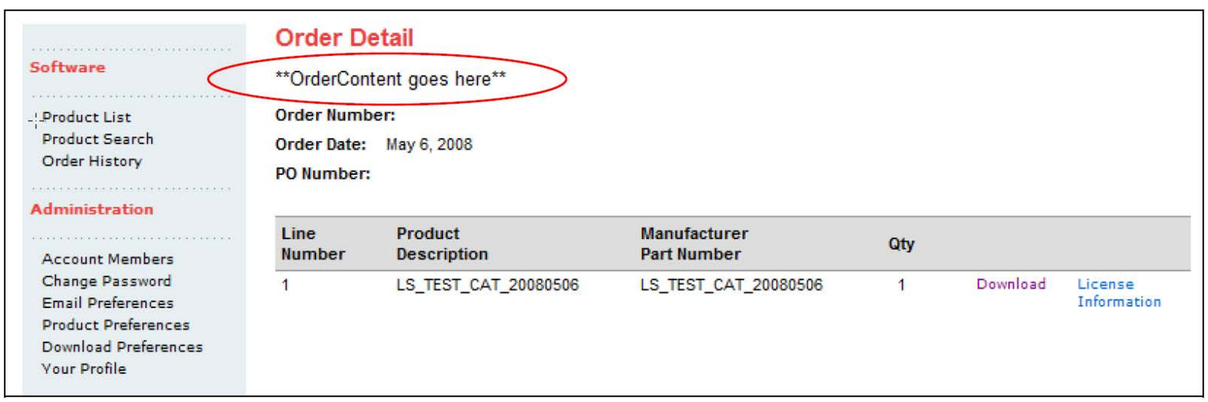


Figure 5-19: LoginContent and OrderContent

ReleaseNewTabSoloContent

The following displays the Page for the **ReleaseNewTabSoloContent**:

Figure 5-20: ReleaseNewTabSoloContent

ReleaseNewTabActiveContent

The following displays the Page for the **ReleaseNewTabActiveContent**:

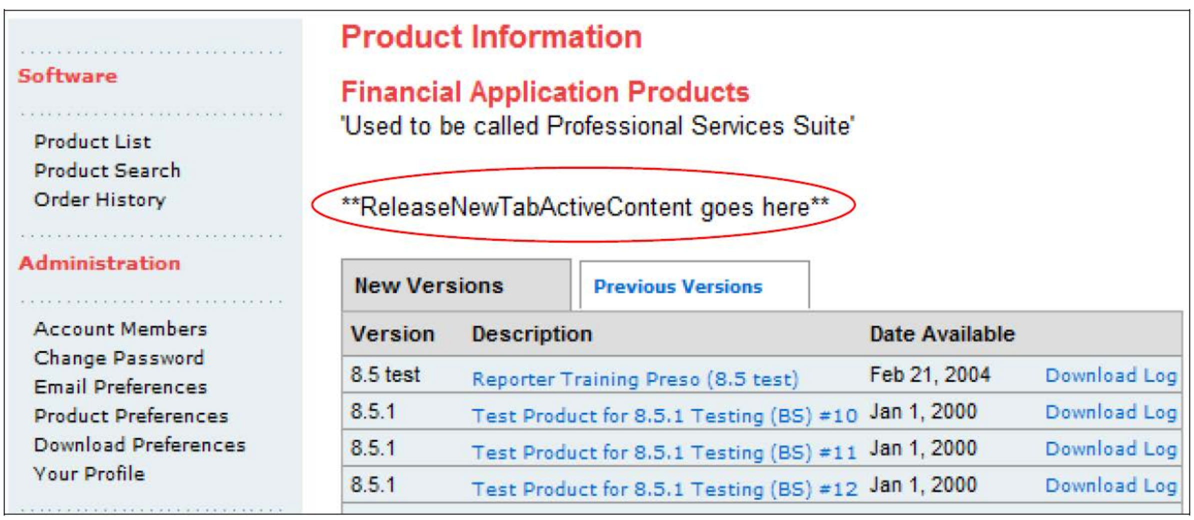


Figure 5-21: ReleaseNewTabActiveContent

ReleaseArchiveTabSoloContent

The following displays the Page for the **ReleaseArchiveTabSoloContent**:

Figure 5-22: ReleaseArchiveTabSoloContent

ReleaseArchiveTabActiveContent

The following displays the Page for the **ReleaseArchiveTabActiveContent**:

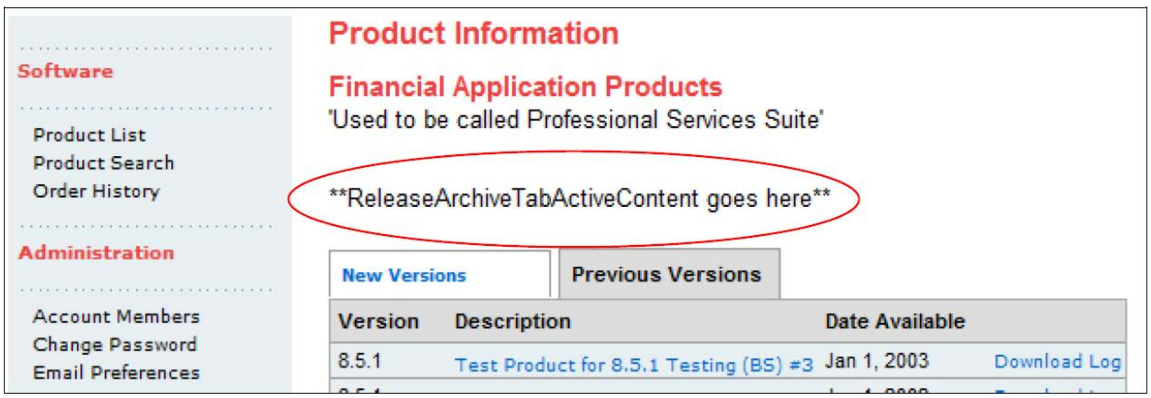


Figure 5-23: ReleaseArchiveTabActiveContent

MemberAddContent

The following displays the Page for the **MemberAddContent**:

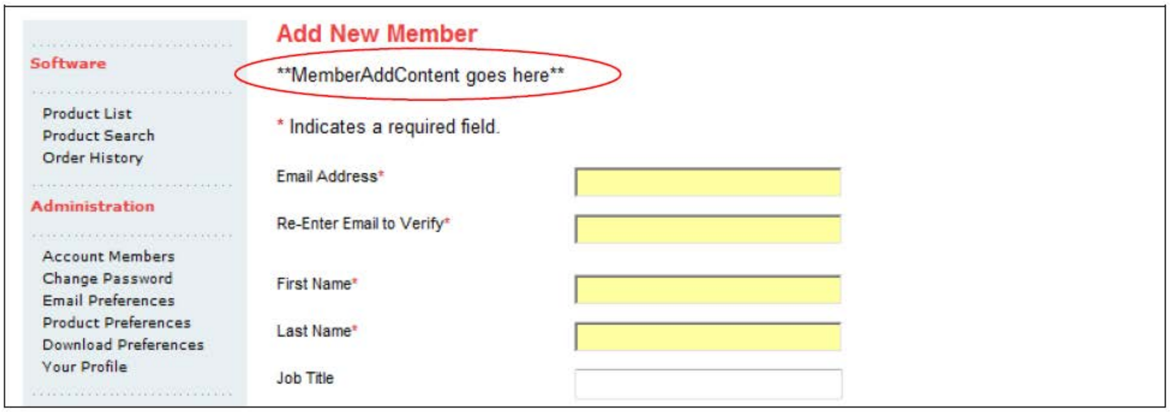


Figure 5-24: MemberAddContent

MemberUpdateContent

The following displays the Page for the **MemberUpdateContent**:

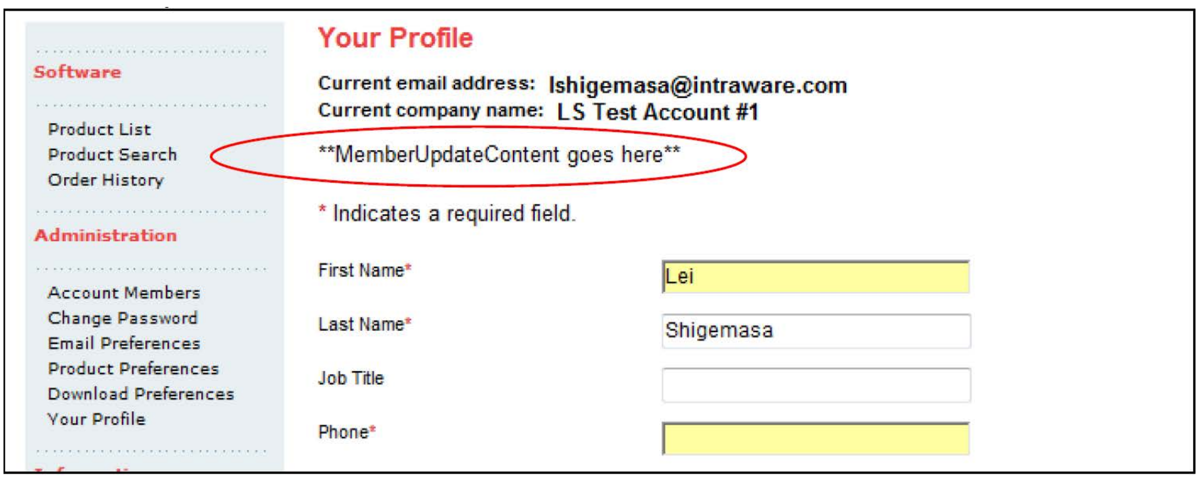


Figure 5-25: MemberUpdateContent

PurchasesContent

The following displays the Page for the **PurchasesContent**:

Figure 5-26: PurchasesContent

SearchContent

The following displays the Page for the **SearchContent**:

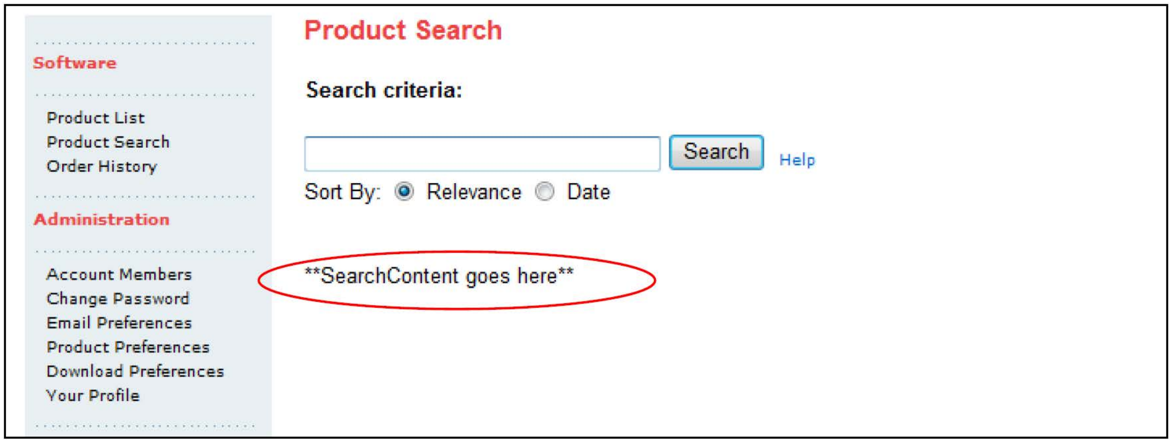


Figure 5-27: SearchContent

SelectAccountContent

The following displays the Page for the **SelectAccountContent**:

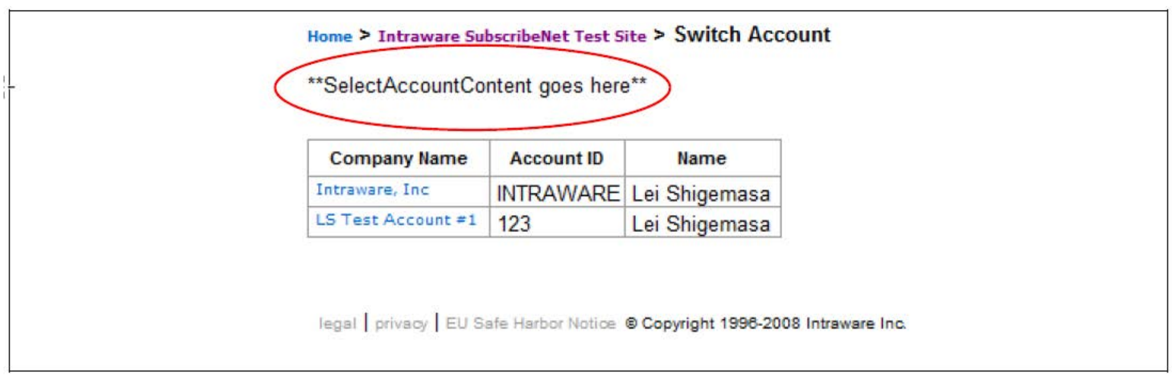


Figure 5-28: SelectAccountContent

Additional Pages Supported for Custom HTML Content

The following table represents the details related to Additional supported pages:

Table 5-8 ▪ Additional supported page

Page Name	HTML Content ID	Notes
Advanced Download	AdvDownloadContent	Displayed on the Advanced Download Options page accessible from the Download page.

Table 5-8 ▪ Additional supported page

Page Name	HTML Content ID	Notes
Cancel Member	MemberCancelContent	Displayed on the Cancel Member page.
Restrict Access	RestrictAccessContent	Displayed on the Restrict Access page.
Download Log	DownloadLogContent	Displayed on the Download Log page.
Download Serial Number	DloadSerialNumContent	Displayed on License page accessible from the Download page.
Email Notice	EmailNoticeContent	Displayed on Email Notice page accessible via an update notification link.
License Order	LicenseOrderContent	Displayed on License page accessible from the Order page.
License Order Line	LicenseOrderlineContent	Displayed on License page accessible from the Order Detail page.
License Overview **	LicenseOverviewContent	Displayed on License Overview page for specific license implementation option.
License Product Line	LicensePlneContent	Displayed on License page accessible from the Product Line (Index) page.
License Product	LicenseProductContent	Displayed on License page accessible from the Product (Version) page.
Manage License Host **	ManageLicenseHostContent	Displayed on Manage License Host page.
Notification Log	NotificationLogContent	Displayed on the Notification Log accessible from the Download page.
Notification Preferences	NotificationPreferencesContent	Displayed on Email (Notification) Preferences page.

Table 5-8 ▪ Additional supported page

Page Name	HTML Content ID	Notes
Order CD	OrderCDContent	Displayed on the Order CD page.
Order CD Confirmation	OrderCDConfirmContent	Displayed on the Order CD Confirmation page.
Password Finder	PasswordFinderContent	Displayed on the Password Finder page.
Password Finder Thanks	PasswordFinderThanksContent	Displayed on the Password Finder Thanks page.
Password Finder Token	PasswordFinderToken1Content	Displayed on the Password Finder Token page.
	PasswordFinderToken2Content	Displayed on the Password Finder Token page (second location).
Password Finder Token Thanks	PasswordFinderTokenThanksContent	Displayed on the Password Finder Token Thanks page.
Product Preferences	ProductPreferencesContent	Displayed on the Product Preferences page.
Change / Reset Password	ResetPasswordContent	Displayed on the Change / Reset Password page.
Change / Reset Password Result	ResetPasswordResultContent	Displayed on the Change / Reset Password Result page.
**Return Rehost Upgrade Confirmation ** **	ReturnRehostUpgradeConfirmContent	Displayed on the Return Rehost Upgrade Confirmation page.
**Return Rehost Upgrade by Host ** **	RehostLicensesByHostContent	Displayed on the Rehost License page.
	ReturnLicensesByHostContent	Displayed on the Return License page.
	UpgradeLicensesByHostContent	Displayed on the Upgrade License page.
**Search License Host ** **	SearchLicenseHostsContent	Displayed on the Search License by Host page.
**Search License Host Result ** **	SearchLicenseHostResultContent	Displayed on the Search License by Host Result page.

Table 5-8 ▪ Additional supported page

Page Name	HTML Content ID	Notes
Search Licenses	SearchLicensesContent	Displayed on the Search License page.
Search Line Items	SearchLineItemsContent	Displayed on the Search Line Items page.
View Cart **	ViewCartContent	Displayed on the View Cart page.
	ViewCartNotesContent	Displayed on the View Cart page.
Agreement	AgreementContent	Displayed on the Agreement page.
Agreement Export	AgreementExportContent	Displayed on the Export Agreement page.
File Checkout **	FileCheckoutContent	Displayed on the Order CD file checkout page for specific implementation.
Home	HomeContent	Displayed on the Home page.
Notes	NotesContent	Displayed on the Notes page.
	NotesAddContent	Displayed on the Add Notes page.
Register to Account **	RegisterToAccountContent	Displayed on the Register to Account page for specific implementation.
Registration	RegistrationContent	Displayed on the Registration page for Try Before You Buy (TBYB) sites.
View Licenses by Generated User **	ViewAcctUsersGenLicensesContent	Displayed on the View Licenses by Generated User page.
View Emails **	ViewEmailsContent	Displayed on the View Emails page accessible from the Home page.
View License Host **	ViewLicenseHostLicensesContent	Displayed on the View License Host page.
View License Host Product Line **	ViewLicenseHostProductLinesContent	Displayed on the View License Host Product Line page.

Table 5-8 ▪ Additional supported page

Page Name	HTML Content ID	Notes
Register to Account	RegisterMemberToAccountIntroduction	Displayed on Registration Page.
	RegisterMemberToAccountThankYou	Displayed on Thank You Page.
View License Host Server **	ViewLicenseHostsServerContent	Displayed on the View License Host Server page.
	ViewLicenseHostsNodeContent	Displayed on the View License Host Node page.
View License by Host Product Category **	ViewLicensesByHostPrdCatContent	Displayed on the View License by Host Product page.
View License Tokens *	ViewLicenseTokensContent	Displayed on the View License Tokens page.
View Member Product Lines **	ViewMemberProductLinesContent	Displayed on the View Member Product Lines page.
View Member Product Lines License **	ViewMemberProductLinesLicensesContent	Displayed on the View Member Product Lines License page.
View Recent Files	ViewRecentFilesContent	Displayed on the View Recent Files page on the Home page for specific implementation.
Register Additional License Token **	RegisterAdditionalLicenseTokensContent	Displayed on the Register Additional Token page.
Register Anonymous License Token **	RegisterAnonymousLicenseTokenContent	Displayed on the Register Anonymous License Token page.
Register License Token **	RegisterLicenseTokenContent	Displayed on the Register License Token page.
Register Order **	RegisterOrderContent	Displayed on the Register Order page that requests Order ID and Authorization Code.

Table 5-8 ▪ Additional supported page

Page Name	HTML Content ID	Notes
Signup	SignupContent	Displayed on the Signup page for Try Before You Buy (TBYB) sites with qualification.
	SignupAdditionalInfo	Displayed after the Signup form fields just before the submit button.
Product Notification Management	ProdNotifManagementContent	Displayed on the Product Notification Management page.
Generate License Wizard **	GenerateLicenseWizardContent	Displayed on the Generate License Wizard page.
Show Message	ShowMessageContent	Displayed on the Show Message page that appears for some errors.
Account List	AccountListContent	Displayed on the Account List page for administrators on multiple accounts to copy a member onto another account.
Order History Search	PurchasesSearchInstructions	Displayed on the Order History page in the search section.
View Recent Products	RecentProductReleasesContent	Displayed on the View Recent Products page.
Create Allocation Group **	CreateAllocationGroupContent	Displayed on the Add Allocation Group page which can be reached from the Manage Groups link.
Search Servers **	SearchServersContent	Displayed on the Search Servers page in the Devices section.
Search Devices **	SearchDevicesContent	Displayed on the Search Devices page in the Devices section.
Claim Device **	ClaimDeviceContent	Displayed on the Claim Device page in the Devices section.
Upload Capability Request **	CapabilityRequestContent	Displayed on the Upload Capability Request page in the Devices section.

Table 5-8 ▪ Additional supported page

Page Name	HTML Content ID	Notes
Search Served Clients **	ServedClientsContent	Displayed on the Search Served Clients page in the Devices section.
Create Server **	CreateServerContent	Displayed on the Create Server page in the Devices section.
Search Mapped Add-Ons **	SearchMappedAddOnsContent	Displayed on the Search Mapped AddOns page.
Map Add-Ons **	MapAddOnsContent	Displayed on the Map AddOns page right under the page header.
	MapAddOnsSearchContent	Displayed on the Map AddOns page right under the subpage header for the Search section.

***Note ▪** Custom implementation. Not all pages are available on all sites. Contact your Client Relations or Project Manager if you have questions about your implementation.*

Password Token

Customers can modify the FlexNet Operations LLM site password process to include a token rather than the password in specified emails. This document describes how to set up the password token link for Producer Portal users.

- Assigning Permission for Using Password Tokens
- Adding a Password Token to an Email Template

Assigning Permission for Using Password Tokens

To enable the password token functionality, a Producer Portal Administrator must first assign the **Maintain Email Template (TMPL)** permission to the appropriate Producer Portal users as shown below:

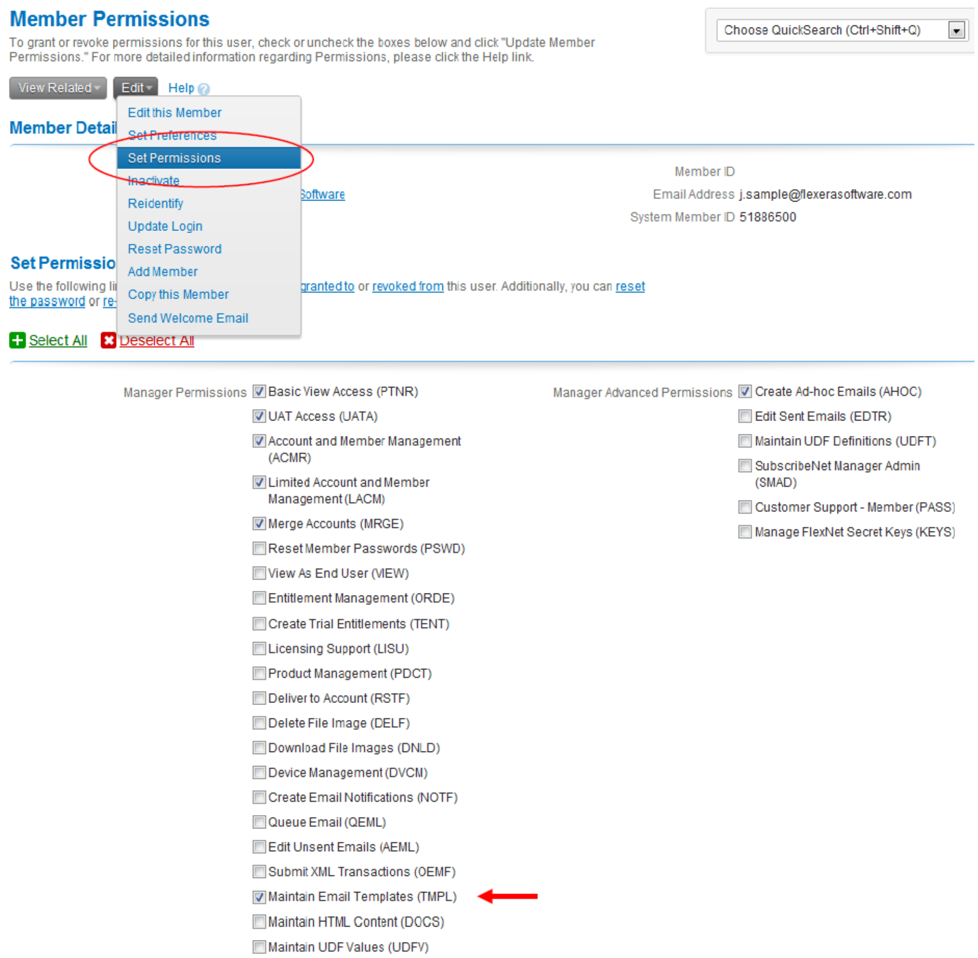


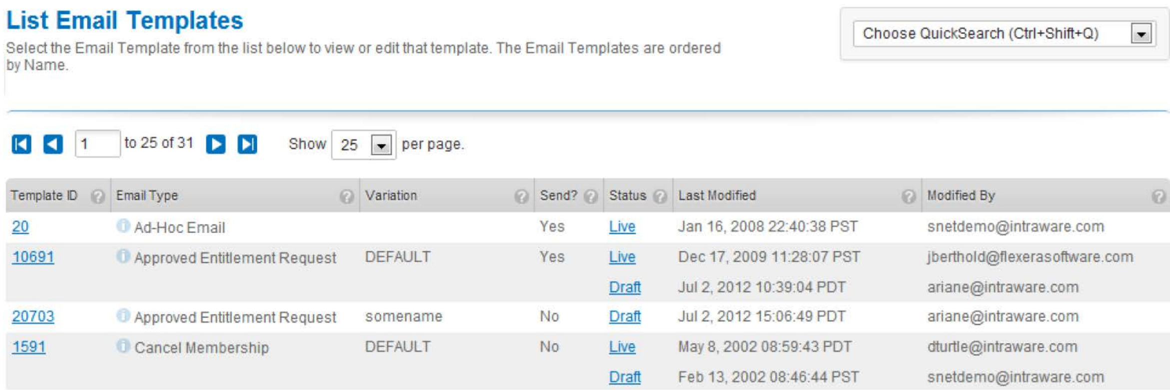
Figure 5-29: Assigning Maintain Email Templates (TMPL) Permission

Adding a Password Token to an Email Template

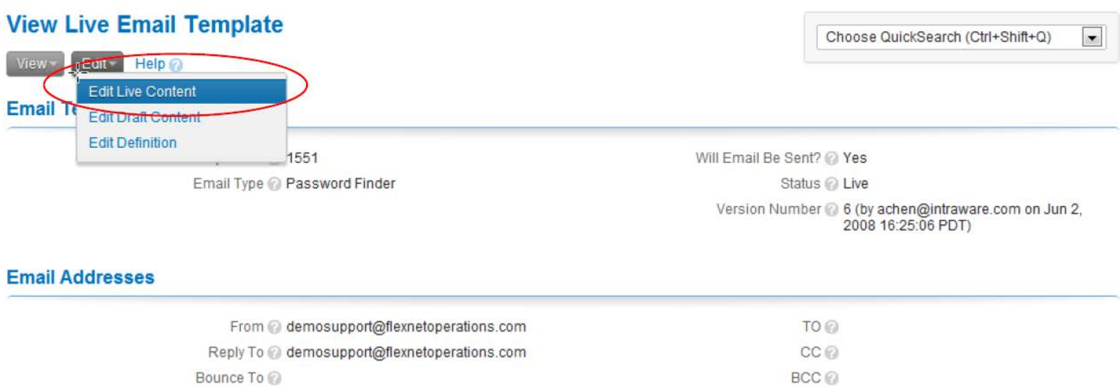
The Producer Portal user with the **Maintain Email Template (TMPL)** permission will have the ability to add a password token to specific email templates following the steps below.

Task ***To add a password token to an email template:***

1. Login to FlexNet Operations LLM Producer Portal and Select the **List Email Templates** option under the **Administer** Menu:



2. Select a template that includes password information such as the Welcome Email, Password Finder or Approved Entitlement Request (for Try Before You Buy sites) templates. Select the menu option **Edit** > **Edit Live Content** as shown the following:



3. Add token merge tag `[[PASSWORD_FINDER_TOKEN]]` in the specified format:

Format	Example
Text Content	`https://PARTNER.flexnetoperations.com/service/PARTNERCODE/passwordfindertoken?token=[[PASSWORD_FINDER_TOKEN]]`
HTML Content	`<a charset="UTF-8" href="https://PARTNER.flexnetoperations.com/service/PARTNERCODE/passwordfindertoken?token=[[PASSWORD_FINDER_TOKEN]]">this link</a>`

4. After reviewing the content, click **Preview and Save**.

5. Next, do one of the following:

    - To save the changes on the template for immediate use, click **Save as Live**.
    - To continue making changes, click **Back to Edit**.

- Click **Save as Draft** if you'd like to save this as a draft version to edit later.

Notes Regarding Adding a Password Token

Consider the following while adding a password token:

- Replace `PARTNER` and `PARTNERCODE` in the links with your site specific information. Example for Demo customer:

  `https://demo.flexnetoperations.com/service/DEMO passwordfindertoken?token=[[PASSWORD_FINDER_TOKEN]]`

- Suggested content for the email template in **Text** section:
  - Please use the following link/URL to reset your password:

    `https://PARTNER.flexnetoperations.com/service/PARTNERCODE/`
    `passwordfindertoken?token=[[PASSWORD_FINDER_TOKEN]]`

  - The generated token is valid for a period of ten minutes. If not used before it expires, you will need to request a new one

    `(https://PARTNER.flexnetoperations.com/service/PARTNERCODE/password)`

- The password token in the HTML content section of the email template should include charset reference as indicated below to address issues with a forward slash (/) in the resulting token:

```
<a charset="UTF-8" href="https://PARTNER.flexnetoperations.com/service/PARTNERCODE/
passwordfindertoken?token=[[PASSWORD_FINDER_TOKEN]]">this link</a>
```

- The password token expires after 10 minutes.

***Note** ▪ Please contact your Revenera Account Manager or Project Manager if you have any questions.*

Order CDs

Customers can allow end users to order product CDs from the FlexNet Operations LLM site for specified products. This document describes the specifications for this process. To enable this feature, contact your Revenera Account Manager or Project Manager.

- Ordering a CD
- Enabling CD Order Option

Ordering a CD

Once the **Order CD** feature is enabled, end users will be able to request product CDs by clicking a link added to the download page on the FlexNet Operations LLM site such as in the example below:

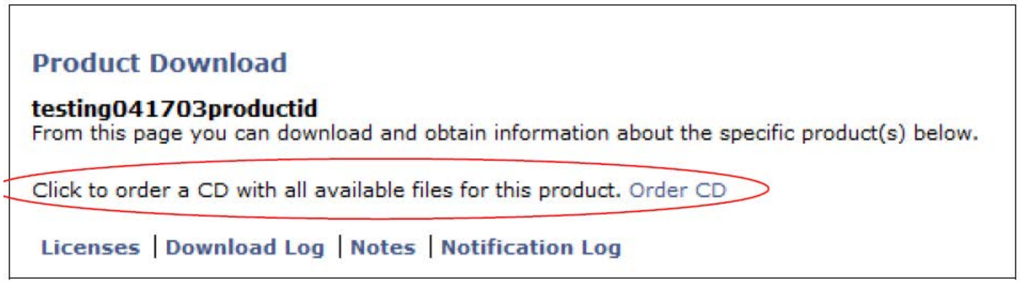


Figure 5-30: Option to Order a CD

Use of this link by the end user will direct them to an **Order CD** page that displays their request and prompts them to confirm their request by clicking an **Order CD** button. FlexNet Operations LLM will display the following information, which the user may update before confirming the request:

- First Name
- Last Name
- Email
- Job Title
- Phone
- Fax
- Street 1
- Street 2
- Street 3
- Street 4
- City
- State/Province
- Postal Code
- Country

The following is a sample order form for ordering a CD.

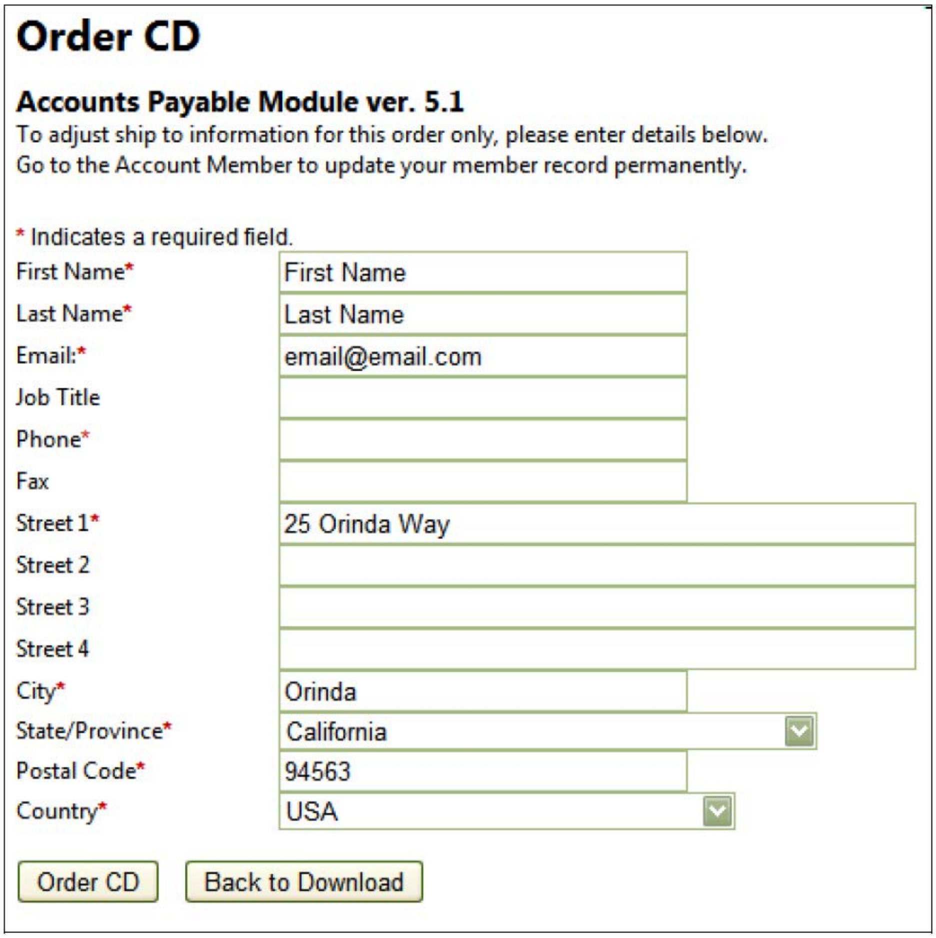


Figure 5-31: Order CD Form

Once the end user clicks on the **Order CD** tab , Revenera will send the Order Product CD Request email to the predefined Customer email address or direct the user to a URL, including the user and product information submitted with the request.

Note the following regarding ordering a CD:

- Customer will provide either an email address or a URL to which the Order CD request will be sent.
- Customer will manage the Order Product CD Request email template if this is used instead of a URL.
- Customer will manage the availability of the Order CD link via the Product attribute “Physical Distribution Available”.

Enabling CD Order Option

The **Order CD** link is only displayed for products that have been set up to be delivered physically. Producer Portal users with the **Product Management** permission will have the ability to add or edit products with this option by setting the Physical Distribution Available attribute on the product to **Yes**.

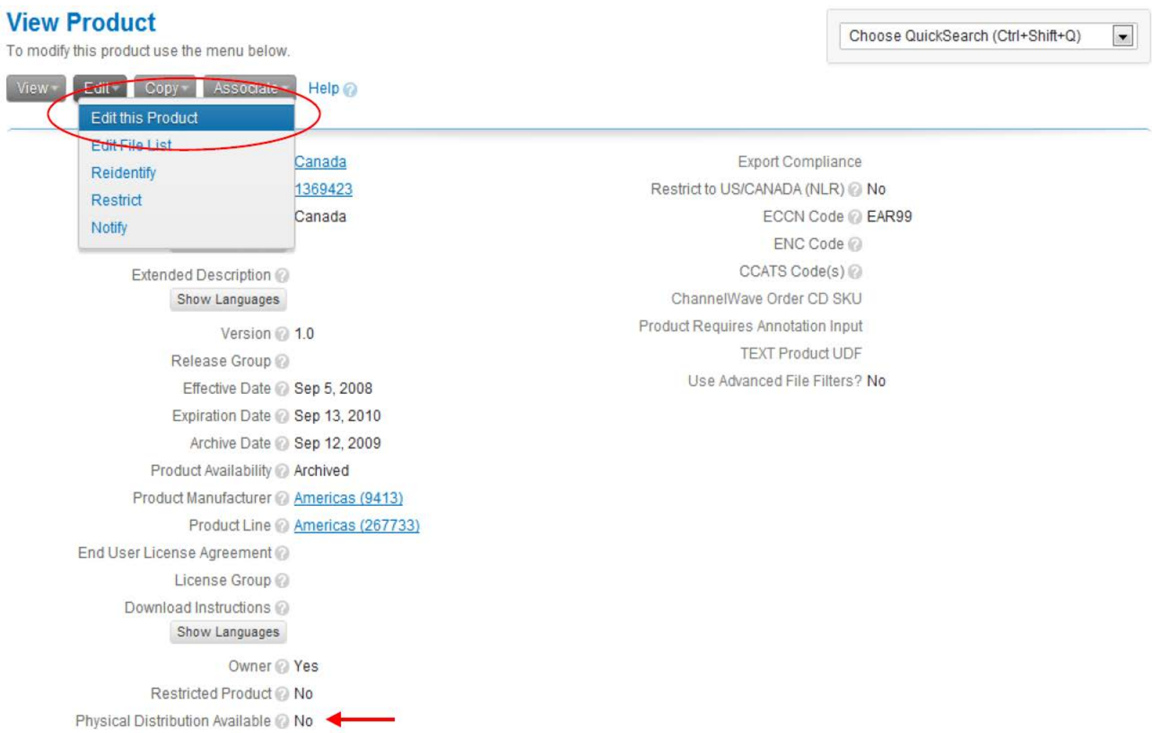


Figure 5-32: Physical Distribution Available Option

Producer Portal users with the **Maintain Email Template (TMPL)** permission will have the ability to edit the Order Product CD Request email template (if being used.)

If you require integration, tracking or confirmation for these processes, please contact your Revenera Account Manager or Project Manager to further define your requirements.

Home Page

Customers can display a home page instead of the standard index page to end users who have logged in to the FlexNet Operations LLM end user site. This document describes the sections included on this home page. To enable this feature, contact your Revenera Account Manager or Project Manager.

- Sections on the Home Page
- Home Page Options

Sections on the Home Page

The home page includes the following three sections:

- **Recent Email Notifications**—Emails sent to the end user within a specified number of days from today. For example, sent in last 30 days.
- **Recent Files Posted** —Files uploaded within a specified number of days from today. For example, uploaded in the last 30 days.

- **Browse My Software and Documentation**—Products available with Manufacturer and Product Line navigation.

Figure 5-33: Sample End User Portal Home Page

Home Page Options

The following are the available options:

- The standard 30 day period can be altered to some other window of time as part of the implementation.
- The **Recent Email Notifications** and **Recent Files Posted** pages can be set up as their own pages with links from the left navigation.

Binary License File Support

Binary License File Support allows customers to issue licenses on the FlexNet Operations LLM site in any file format using Base64 encoding. Please contact your Revenera Account Manager or Project Manager if you are interested in this functionality.

Before you can use Binary License File Support, application configuration changes are required by Revenera. Once this feature is enabled, you will need to update the appropriate Catalog Item definitions to use this licensing scheme.

- FlexNet Operations LLM Producer Portal Changes to Enable Binary License File Support

- XML Integration
- Viewing Binary Licenses in FlexNet Operations LLM
- Reporting on Binary License Files

FlexNet Operations LLM Producer Portal Changes to Enable Binary License File Support

There will be an option to upload license files for each entitlement line from the add or update entitlement pages in FlexNet Operations LLM Producer Portal. You will use the standard **Browse** functionality in your web browser to find and add the license file to the web form. The following displays uploading the license file:

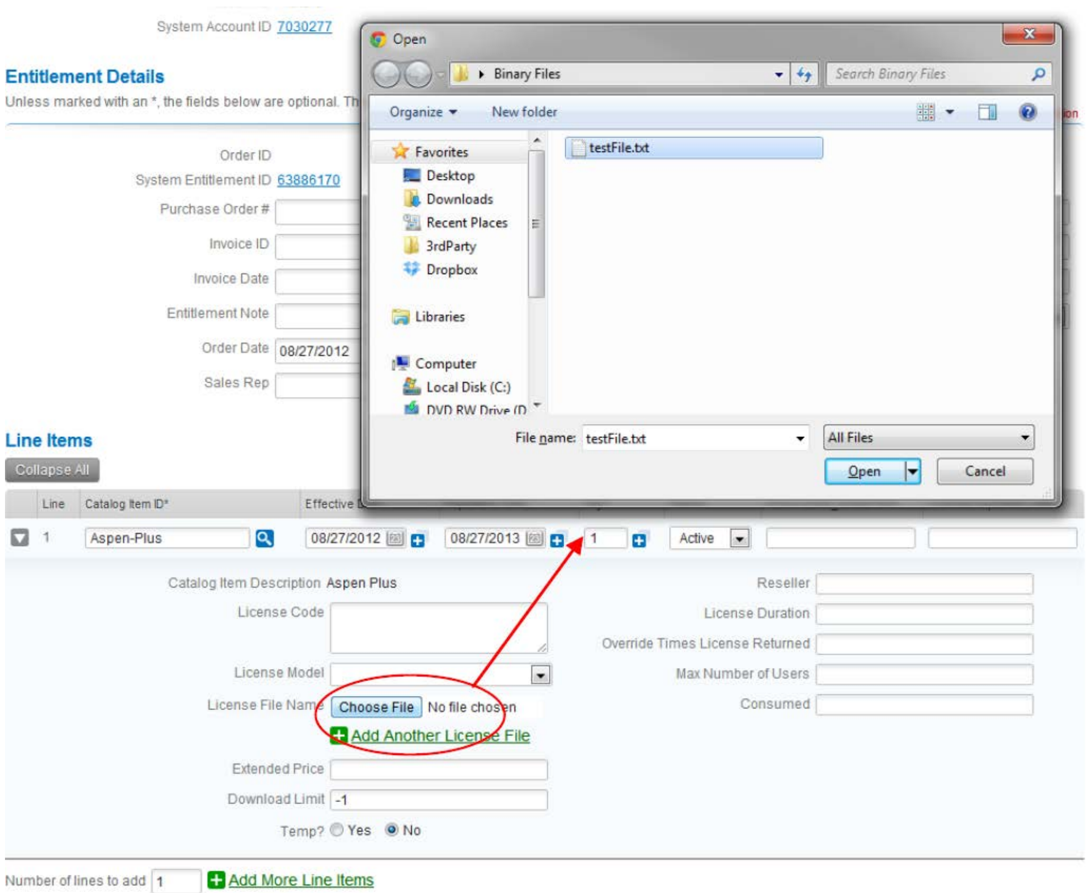


Figure 5-34: Choosing a License File in the FlexNet Operations LLM Producer Portal

After you have processed the order, the filename will be displayed for future reference. By clicking on the file name, you can download the license file so that you can verify its content. The following indicates the license file name:

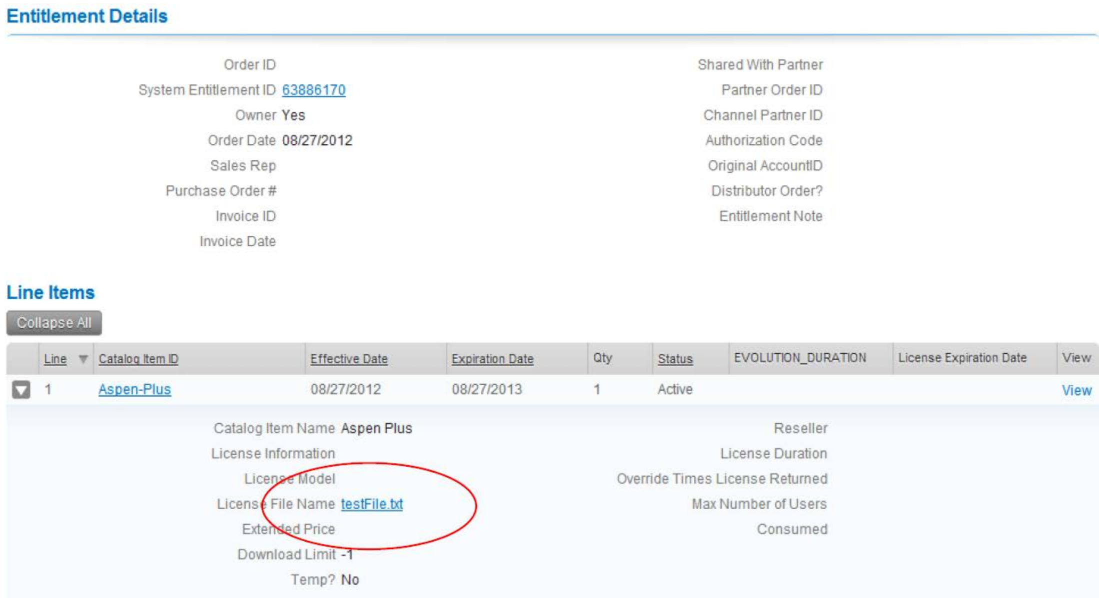


Figure 5-35: License File Name Field with Uploaded License Name

XML Integration

The order line element within the Order Transaction Schema has an additional field of `<LicenseFileName>`. To load a license file, set the filename field and populate the `<LicenseCode>` field with the Base64 encoded representation of the license file. For example:

```
…
<SKU>MY-PART-NUMBER</SKU>
<Quantity>10</Quantity>
<LicenseFileName>license.txt</LicenseFileName>
<LicenseCode>bGljZW5zZSBmaWxlIGNvbnRlbnQ=</LicenseCode>
…
```

The filename you specify will be the filename used when the license file is downloaded to the end user.

Viewing Binary Licenses in FlexNet Operations LLM

Binary License files are accessible in the FlexNet Operations LLM service in the same way the plain text licenses are made available. This can be from the **License Key** link on the download page, **Order History** page, or **Index** page, depending on your implementation.

The two types of licenses are displayed differently.

- Plain text licenses are displayed on the page.
- Binary License files appear as a link from which you are able to download the file.

The following displays the license file information:

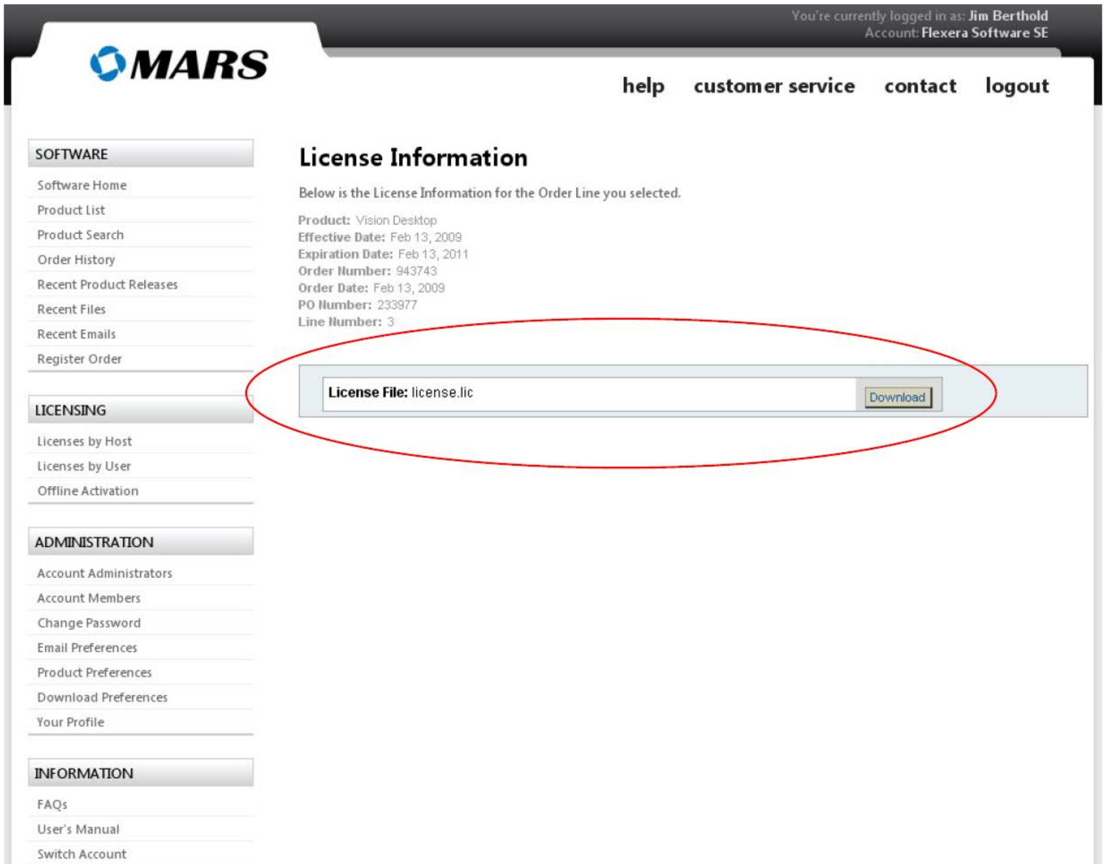


Figure 5-36: License File Information on End User Portal Site

Note *▪ Depending on the user's browser configuration for specific file types, some files may render directly in the browser, rather than display a* ***Save As*** *dialog box.*

Reporting on Binary License Files

Revenera will include a new Reporter data universe called **Licenses Saved** to include the date when members save binary license files.

Contact your Revenera Account Manager or Project Manager if you are interested in this functionality.

Localized Emails

To maximize the end-user experience in every market and support global branding, customers can localize their sites, products and outgoing emails using the FlexNet Operations LLM service. Site and product localization requires separate implementation. To implement localized emails, contact your Revenera Account Manager or Project Manager, identifying the languages you would like to make available for emails.

Once the localized email feature has been implemented on FlexNet Operations LLM Producer Portal, the Member, Account Administrator and/or Manager user with the appropriate permissions will be able to set the language preference to be used for outgoing emails from FlexNet Operations LLM.

- Enabling Email Localization
- How a Member Can Set Email Language Preference
- Setting Email Language Preference for a Member
- Language Sections in Email Template
- Considerations Regarding Language Preference

Enabling Email Localization

To implement, Revenera will set up a Member Level User Defined Field (UDF) called `MBR_LANG` with predefined languages / language codes used to set the member choice for localized emails. The following displays the **View User Defined Field** page:

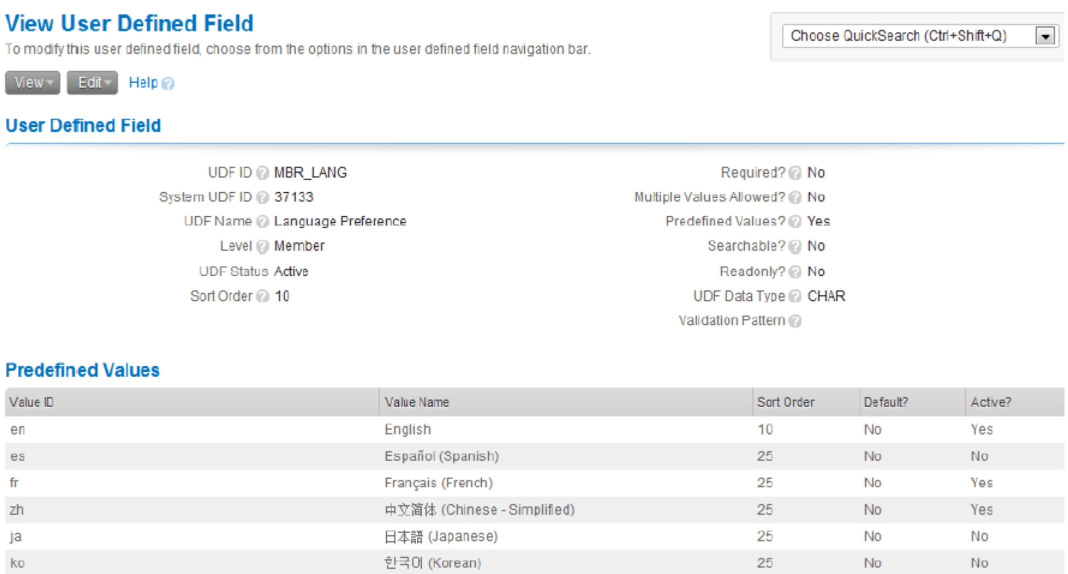


Figure 5-37: MBR_LANG User Defined Field on View User Defined Field Page

How a Member Can Set Email Language Preference

The Member can set their email language preference on the **Email Preferences** page or their **Profile** page. The following displays the **Email Preferences** page:

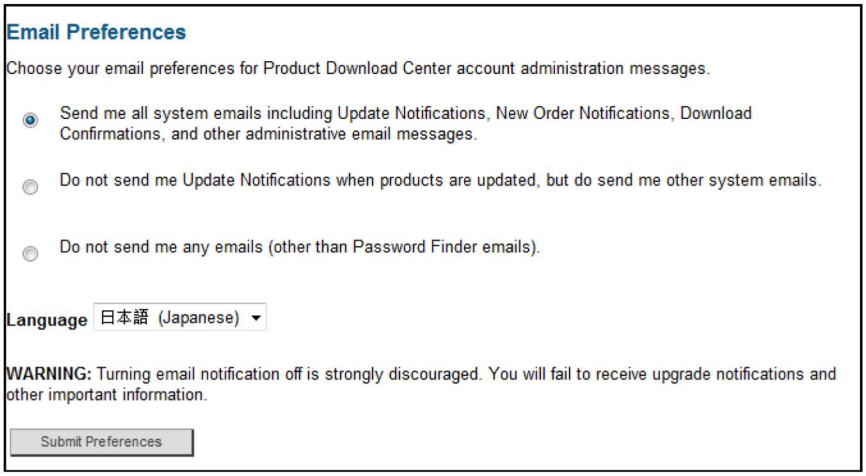


Figure 5-38: Language Field on Email Preferences Page

Setting Email Language Preference for a Member

An Account Administrator can set the email language preference for users via FlexNet Operations LLM on the **Add Member** or **Edit Member** page. The following displays the **Add Member** page:

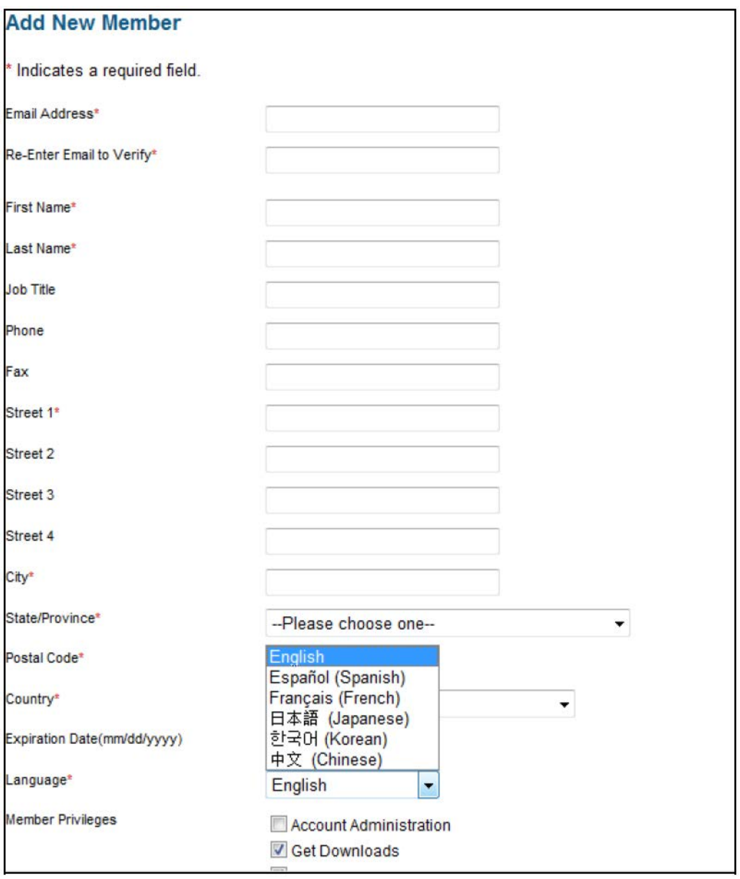


Figure 5-39: Language Setting on Add New Member Page

The Manager user will be able to provide this information on the **Add Member** or **Edit Member** pages in the Producer Portal.

The following displays the **Edit Member** page:

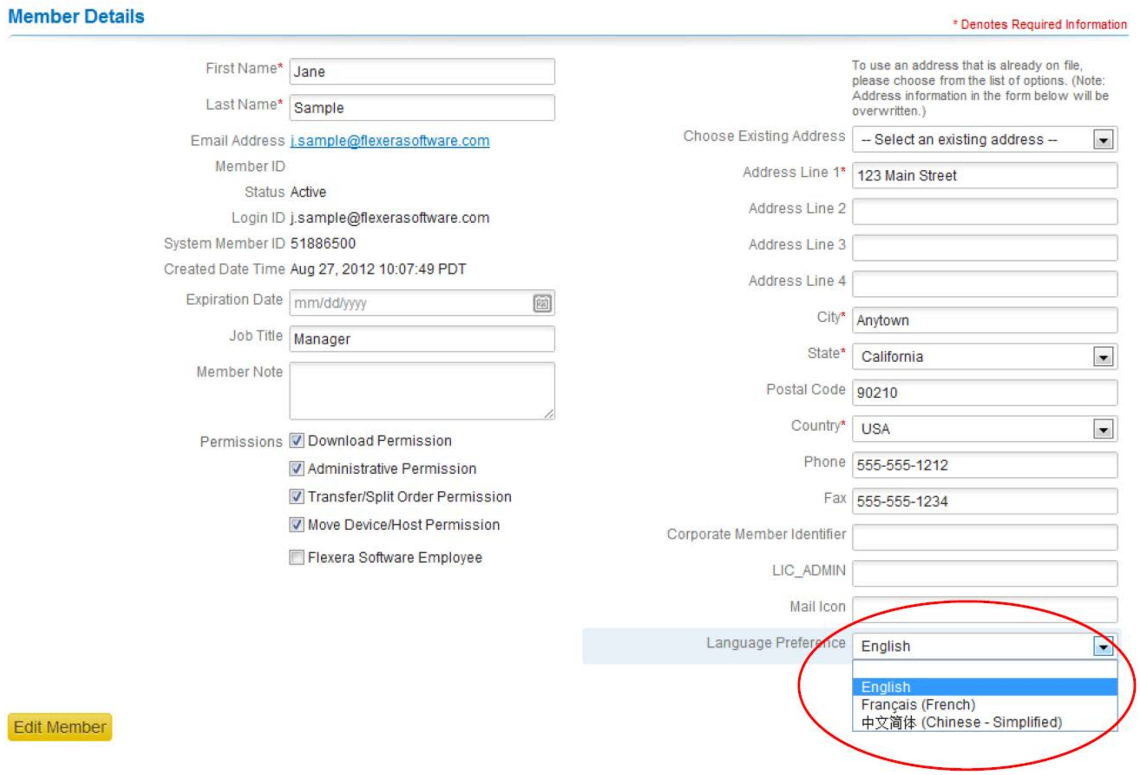


Figure 5-40: Language Setting on Edit Member Page

Language Sections in Email Template

All email templates will include new language sections for both Text and HTML content. The following displays the **View Live Email Template** page:

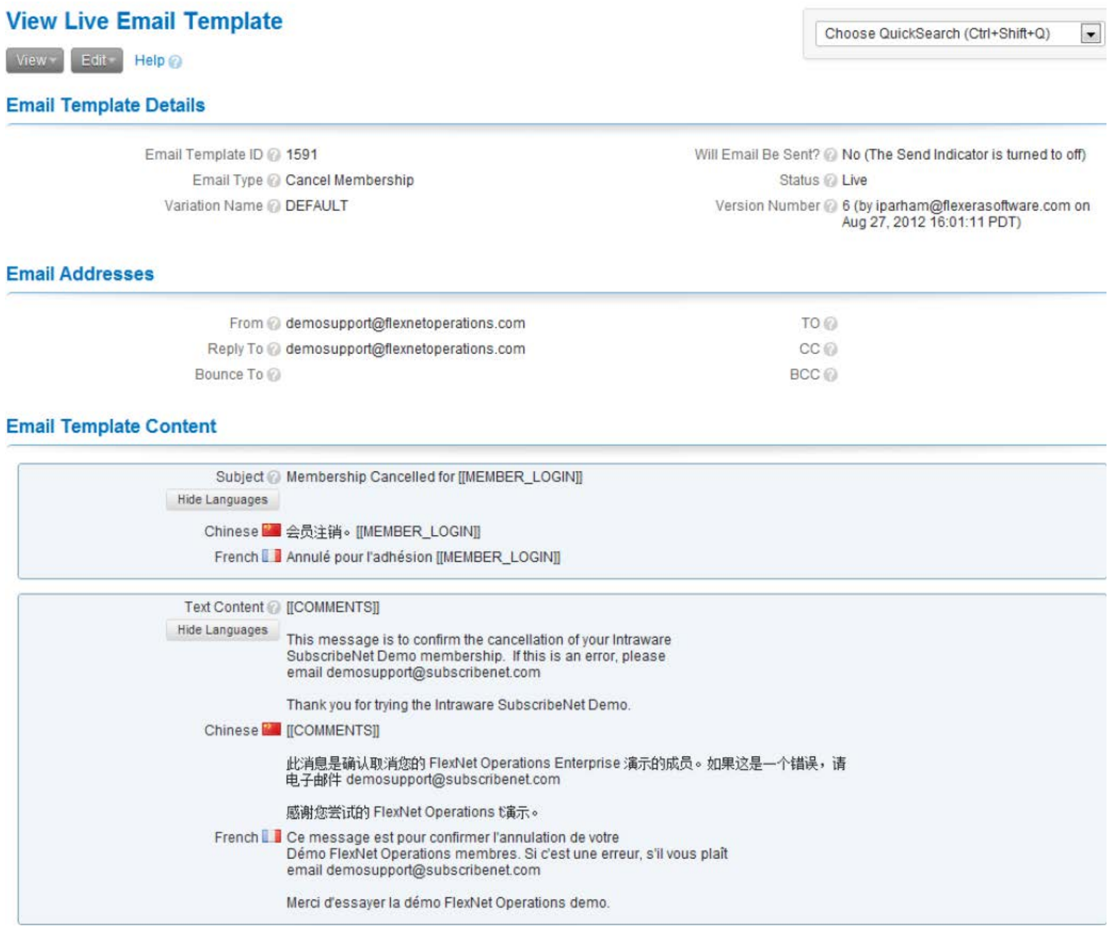


Figure 5-41: Language Sections in Email Template

Considerations Regarding Language Preference

Consider the following regarding language preference:

- The language preference applies to all emails except the password finder emails. The language used for the password finder would be based on the site from which the request is submitted. If you do not have a localized site(s), the default is in English.
- If there is no localized content provided in the email template, default displayed to the user is English.
- Localized product fields become available in FlexNet Operations LLM Producer Portal with the localized email feature. These localized product fields are not displayed on the FlexNet Operations LLM site unless you have implemented localized sites (i.e. if your site is still only in English, adding Japanese product descriptions will not cause the alternate language of Japanese to appear for that product).
- Localized sites are available.

Contact your Revenera Account Manager or Project Manager to implement this feature.

Single Sign-On Process

Single Sign-On for FlexNet Operations LLM will allow Customers to forward a user who has already been authenticated by the Customer to their FlexNet Operations LLM website without prompting the user to log in again.

- Revenera Obligations
- Customer’s Obligation
- Single Sign-On Considerations

Revenera Obligations

Revenera’s FlexNet Operations LLM application uses a login servlet, which when hit by a browser, will check that the referring URL of the request matches the domain specified by the Customer. If it does, it will attempt to log in the user using the username parameter passed to the login servlet (normally equivalent to the email address).

The username can be passed as a query string parameter within the URL or using HTTPS post.

For additional security, the username is encrypted by the Customer’s referring server by using the DESede algorithm and an agreed upon shared secret key, which FlexNet Operations LLM will use to recover the original username.

To prevent replay attacks, the Customer’s referring server may also include a time-based token which the FlexNet Operations LLM service will check before providing access to the user Account.

If the authentication fails, either because the referrer URL doesn't match or because some other component of the supplied credentials is invalid, the user will be redirected to a URL specified by the Customer.

If authentication completes successfully, the user will be forwarded to the FlexNet Operations LLM page specified in the URL (using the ‘nextURL’ parameter, e.g., a product download page).

The FlexNet Operations LLM application will log the user in and set two cookies in the browser of the user:

- A session cookie which includes the encoded username and password.
- A session cookie which carries the application server's session ID. On subsequent page hits to the FlexNet Operations LLM application, the user will be considered logged in if the authentication cookie is present, and if the session ID of the current session matches the session ID found in the session cookie.

Customer’s Obligation

Customer will participate in User Acceptance Testing for the requirements and will sign off once complete.

Customer will modify its website(s) so that the URL for the link(s) to the FlexNet Operations LLM site includes the FlexNet Operations LLM encrypted Login ID and time-base token, action parameter, and destination page. The format for the URL is:

```
https://<% customer name %>.flexnetoperations.com/control/<% customer code
%>/login?email=<% encrypted Login ID %>&encToken=<% encrypted timestamp
%>&action=authenticate&nextURL=index
```

Customer will provide Revenera with a domain name/URL, which will be used to match the referring URL. If the referring URL is valid and the user credentials are correct, the user will be logged in.

Customer will provide Revenera with the URL of the page to which the user will be redirected if the Single Sign-On attempt fails, presumably either the Customer authentication page or the FlexNet Operations LLM login servlet. Note that this also becomes the default authentication mechanism for users who are directly accessing the Customer FlexNet Operations LLM site.

Customer will provide Revenera with the URL of the page to direct user upon logout.

The Customer may also choose to use the un–encrypted Single Sign-On approach. In this approach, the user credentials are not encrypted prior to inclusion in the request. The format of the URL is:

```
https://<% customer name %>.flexnetoperations.com/control/<% customer code
%>/login?email=<% Login ID %>action=authenticate&nextURL=index
```

Single Sign-On Considerations

Revenera’s secure Single Sign-On option is both flexible and available at a low cost. Our intent is to ease implementation across platforms without dependencies on other authentication mechanisms or technologies such as SAML, OAuth, OpenID, etc. Please advise your Account Manager if you are using a 3rd party to host your identity management services and also have interest in Revenera’s Single Sign On option.

Login ID Parameter

One decision that needs to be made is the determination of whether standard login via form post will be offered in addition to SSO. If both methods are implemented, the name of the parameter used to supply the Login ID in the request must be ‘email’. If SSO only is allowed, the parameter name must be ‘username’.

Passwords

By default, a FlexNet Operations LLM password is created and stored when a Member is created, so this will always occur. In the case of SSO, we only use the password in a cookie which is relied on during the course of the session - it is not used for the initial authentication/authorization request in any way. In fact, the user does not need to know what it is or that we have it (unless he or she wants to use FTP download).

We do not maintain a copy of the Customer’s users’ passwords, so there’s no record of it in our data store and thus no cause for concern of it being compromised.

6

Product Management

This section explains how to use items on the **Package Products** main menu and also includes other information that provides more insight on product management support:

- Packaging Products
- Product Management Support

Packaging Products

This section explains how to use the items on the **Package Products** main menu.

- About Package Products
- Catalog Items
- Product
- File
- Configure

About Package Products

The **Package Products** section of the Producer Portal lets you add product information to FlexNet Producer Portal, edit or update products that are already in the system, and upload the actual downloadable files.

You manage products at three different levels in the Producer Portal:

- **Catalog Items** (price list items) represent the things that your company sells. For example, a product or a maintenance agreement. Catalog Items have attributes such as default duration, whether the Catalog Item includes updates (maintenance), etc. Catalog Items generally reference one or more Products.
- **Products** (product releases) represent the things that your company wants delivered. For example, a specific version of a product. Products have attributes such as export licenses, version number, platform, archive dates, etc.. Products reference one or more Files.

- **Files** (images) are the actual software files that the end user downloads. For example, the installation executable for a particular platform. A File may be associated to one or more Products.

The **QuickSearch** box lets you quickly find a Catalog Item or Product if you know the corresponding Name or ID. If your search criteria match more than one Catalog Item or Product, you will be given the opportunity to choose the Catalog Item or Product from a list. This function is not case sensitive and supports the use of the "*" character as a wildcard in most fields.

Catalog Items

The following sections describe the **Catalog Items** area of the **Package Products** section of the Producer Portal.

- Search Catalog Items
- Add Catalog Item
- View Catalog Item
- Edit Catalog Item

Search Catalog Items

Catalog Items have a number of attributes which you can use to locate the Item(s) you are interested in:

Table 6-1 ▪ Search Catalog Items

Item	Description
Catalog Item ID	Unique identifier that your company's internal systems may use to identify your price list items
System Catalog Item ID	Unique identifier created by the System when the Catalog Item was created in the Producer Portal
Catalog Item Name	Descriptive name that your company uses to identify your price list items
Catalog Manufacturer	Either the company or a product group within the company
Catalog Product Line	Identifier for a group of Catalog Items, usually the same as the Product Line under Product but may be different in the case of product bundles or suites
Status	Catalog Items may be Active or Inactive, meaning these catalog items will be hidden from quick searches. If you want to prevent orders being processed for Inactive Catalog Items we can enable such a validation. Discuss this with Support or a Client Relationship Manager.

The **Search Catalog Item** function is not case sensitive and supports the use of the "*" character as a wildcard.

***Note ▪** Wildcards cannot be used for System ID fields.*

If your search criteria match more than one Catalog Item, you will be given the opportunity to choose the one you are looking for from a list of those matching your criteria.

Once you have selected a Catalog Item you can use the **CATALOG** menu to:

- **Edit the item**—See Edit Catalog Item.
- **Associate (or disassociate) products to (from) the Catalog Item**—See Associate Product and Disassociate Product.
- **Reidentify the Catalog Item**—See Reidentify (ReID) Catalog Item.
- **Inactivate/Reactivate the Catalog Item**—See Inactivate.
- **Copy the Catalog Item**—Copy the Catalog Item as a short-cut to making a new Catalog Item with similar characteristics. See Copy Catalog Item.

Add Catalog Item

Catalog Items (price list items) represent the things that your company sells, for example, a product or a maintenance agreement. When you Entitle your customers (or process orders) in the Producer Portal, you entitle them to Catalog Items. Catalog Items, in turn, are normally associated with one or more Products.

To add a Catalog Item you provide the following information:

Table 6-2 ▪ Catalog Item Properties

Item	Description
Catalog Item ID	Your company's unique identifier for this item; this will often be a sales catalog or price list ID. The Catalog Item ID is displayed on the FlexNet Producer Portal Entitlement History page.
Catalog Item Name	Short description of the Catalog Item, such as "Product X with one year maintenance". The Catalog Item Name is displayed on the Entitlement History page and can be used in the Entitlement Notification email.
Catalog Item Type	Catalog Item Type can be used to inform FlexNet Producer Portal not to process entitlement lines for this Catalog Item. In particular it is used when you need to process Entitlements (orders) for items that you don't want FlexNet Producer Portal to deliver, such as support contracts. The type has three possible values: • **Normal**—As the name implies, most of the Catalog Items will be **Normal** and this is what you should use unless your company has configured one of the other types. • **Report Only**—When FlexNet Producer Portal receives an entitlement for a **Report Only** Catalog Item, it reports the entitlement in FlexNet Operations Reporter but does not attempt to grant an entitlement to an Account. • **Ignore**—When FlexNet Producer Portal receives an Entitlement line for an **Ignore** Catalog Item, FlexNet Producer Portal will completely ignore the line.

Table 6-2 ▪ Catalog Item Properties

Item	Description
Subscription (Yes/No)	Defaults to **Yes**. If **No** is selected (non-subscription Catalog Item) this Catalog Item will not be updated when you use the **Associate Where** feature to automatically give users access to a new product based on access to another product
Temporary (Yes/No)	Defaults to **No**. If **Yes** is selected (temporary Catalog Item) then your customers will not continue to have access to the Products associated with this Catalog Item after the expiration date of their Entitlement. This is often used for try and buy evaluations.
Default Duration	The default duration of an Entitlement to this Catalog Item. Default Duration is overridden by changing the Expiration Date on an Entitlement
Download Limit (Yes/No)	Default is **No**. If **Yes** is selected the files associated with Products which are entitled through this Catalog Item may only be downloaded a limited number of times, otherwise the files may be downloaded an unlimited number of times.
Default Maximum Download Limit	Default value for the number of times files entitled through this Catalog Item can be downloaded. The default value can be overridden by explicitly providing a download limit on the entitlement. This only applies when the Download Limit attribute is set to **Yes**.
Catalog Manufacturer	List of configured companies or product groups. Manufacturer is configured via the **Configure** menu.
Catalog Product Line	List of configured product groupings. Catalog Product Line is configured via the **Configure** menu. The Catalog Product Line is displayed on the FlexNet Producer Portal index page.
License Group	List of configured license key groups. If your company only supports one group you will only see one choice. License groups are normally configured when your site is first set up. If you need to configure additional license groups you should contact your Revenera Client Relations Manager.
Support Agreement	List of configured agreements that may be associated with this Catalog Item. Each catalog item may be associated with one agreement. You can create or edit the Agreements through the "Configure" menu option. Note that your site must be configured to use Support Agreements for this to be meaningful. Please contact your Client Relations Manager for more information.

View Catalog Item

The **View Catalog Item** screen is accessed either by searching for and selecting an existing Catalog Item or by creating a new Catalog Item.

- The **View Catalog Item** screen displays the current values for the Catalog Item attributes.
- This screen also shows the Product(s) associated with this Catalog Item.

Clicking on a Product Name will take you to that Product's View Product page.

Edit Catalog Item

Use the **Edit Catalog Item** form to edit any of the catalog attributes except the Catalog Item ID.

When you make changes to a Catalog Item already in production, existing entitlements based on the Catalog Item will remain in place.

The new Catalog Item attributes will appear in FlexNet Operations Reporter and wherever displayed on the FlexNet Producer Portal site. To change the Catalog Item ID you need to use **Reidentify**.

Associate Product

To associate Products with a Catalog Item, you must first identify the Catalog Item either by searching for and selecting an existing Catalog Item, or by creating a new Catalog Item.

When you choose **Associate Product** from the **CATALOG** menu you will be prompted to search for the Product(s) you want to associate with this Catalog Item.

- All Products which match your search criteria will be displayed.
- Click on the check box of the one(s) you want to associate to the Catalog Item and then click the **Associate** button at the bottom of the form.
- The Product(s) you selected will be added to the list of **Products in this Catalog Item**.

You can also add a specific product to one or more Catalog Items by using the **Associate To Catalog** menu item from the **PRODUCT** menu.

Disassociate Product

The **Disassociate Product** form prompts you to select one or more Products which are currently associated with the Catalog Item.

When you click on **Disassociate Product**, the selected Products will no longer be associated with this Catalog Item and users who had access to the selected Products through this Catalog Item will no longer have access to them (unless access is provided through another Catalog Item).

Reidentify (ReID) Catalog Item

Use the **Reidentify** form to change the Catalog Item ID.

All existing entitlements based on the Catalog Item will remain in place but will reflect the new Catalog Item ID in FlexNet Operations Reporter and wherever displayed on the FlexNet Producer Portal site (e.g., on the **Entitlement History** page).

Inactivate

Select **Inactivate** from the **CATALOG ITEM** menu to change the status of a Catalog Item.

When you select **Inactivate**, the Catalog Item's status changes to **Inactivated**. This catalog item will now be hidden from quick searches. Existing entitlements will not be affected.

Note ▪ *If you want to prevent orders being processed for Inactive Catalog Items, Revenera can enable such a validation. Discuss this with Revenera Support.*

Copy Catalog Item

If you want to create a new Catalog Item that is very similar to an existing one, you can use the **Copy** function on the **CATALOG ITEM** menu.

The **Copy** function will copy all of the attribute values of the original Catalog Item into the corresponding fields of a new **Add Catalog Item** form. You can then make any changes necessary to distinguish the new Catalog Item from the original and then save the new Catalog Item.

Export Catalog Item

Export Catalog Item Tree will create a downloadable XML batch file with the transactions necessary to recreate or archive the Catalog Item Tree:

- AddCatalogItem
- AddProduct
- AddFile
- AddProductsToCatalogItems
- AddFilesToProducts

Export Catalog Item will create a downloadable XML batch file with the AddCatalog transaction necessary to recreate or archive the Catalog Item:

- AddCatalogItem

Note ▪ *The following must exist in the target environment. Otherwise, some transactions will fail, when the exported XML batch file is uploaded:*

- *Product Lines with the matching Product Line IDs.*
- *Manufacturers with the matching Manufacturer IDs.*
- *License Groups with the matching License Group IDs.*
- *Agreements with the matching System Agreement IDs.*

Additional information

- Readonly User Defined Fields will be excluded. These values are maintained by specific application processes.
- Catalog Items, Product and Files without IDs will be created, but, since there is no way to reference them, they will be excluded from the association transactions (ex. AddProductsToCatalogItems and AddFilesToProducts). The System IDs cannot be used, since they will be not be the same in the other environments.
- The export functionality is only available to Members with the Product Management (PDCT) permission.

Product

The following sections describe the **Product** area of the **Package Products** section of the Producer Portal.

- Search Products
- Add Product
- View Product
- Where Used
- Edit Product
- Edit File List (Sort Files)
- Associate/Disassociate: Associate File
- Associate/Disassociate: Disassociate File
- Associate/Disassociate: Associate to Catalog Item
- Associate/Disassociate: Disassociate from Catalog Item
- Associate/Disassociate: Associate Where
- Reidentify (ReID) Product
- Copy Product
- Copy to Catalog Item
- Notify
- View Emails

Search Products

Products have a number of attributes which you can use to locate the product(s) you are interested in:

Table 6-3 ▪ Search Products Attributes

Attribute	Description
Product ID	Unique identifier that your company's internal systems may use to identify your shippable items, often called a “part number”.
System Product ID	Unique identifier created by the System when the Product was created in the the Producer Portal system.
Product Name	Descriptive name that your company uses to identify the products it ships (delivers electronically).
Product Manufacturer	Either the company or a product group within the company.
Product Line	Identifier for a group of Products.
Status	Products may be Active, meaning that new entitlements can include these items, or Inactive, meaning that these items will not be included even if they are associated with Catalog Items which are entitled.

The **Search Product** function is not case sensitive and supports the use of the "*" character as a wildcard. Note that wildcards cannot be used for System ID fields.

If your search criteria match more than one Product then you are given the opportunity to choose the one you are looking for from a list of those matching your criteria.

Once you have selected a Product you can use the **PRODUCT** menu to:

- **Where Used**—Find all the Catalog Items which are associated with this Product (Where Used). See Where Used.
- **Edit**—Edit the Product attributes, including the sort order of the Files associated with this Product. See Edit Product.
- **Associate (or disassociate) Files to (from) the Product**—See Associate/Disassociate: Associate File or Associate/Disassociate: Disassociate File.
- **Associate (or disassociate) the Product with a particular Catalog Item or Items**—See Associate/Disassociate: Associate to Catalog Item or Associate/Disassociate: Disassociate from Catalog Item.
- **Associate/Disassociate: Associate Where**—Instruct FlexNet Producer Portal to use this Product in all the Catalog Items where some other Product is used -- e.g., use version 2.1.1 wherever version 2.1 is found. (Associate Where). See Associate/Disassociate: Associate Where.
- **Reidentify the Product**—See Reidentify (ReID) Product.
- **Copy**—Copy the Product information as a short-cut to making a new Product with similar characteristics. See Copy Product.

- **Copy to Catalog Item**—Copy the Product information as a short-cut to making a new Catalog Item with similar characteristics. See Copy to Catalog Item.
- **Notify**—Send email notification to users who have entitlements which include this Product. See Notify.

Add Product

The Product that you add through the Producer Portal is a logical description of one or more downloadable files, often bundled together as a “release”. These “deliverable” Products are associated with one or more Catalog Items through which the Product is entitled.

To complete the Product Information section you enter the following information:

Table 6-4 • Product Properties

Property	Description
Product ID	Unique name or code that your company uses to identify this particular deliverable unit
Product Name	A “user friendly” name for the product. The product name is displayed and used as navigation on the FlexNet Producer Portal site
Product Version	May be numerical or text, the version distinguishes similar deliverable items from each other. The version is displayed on the FlexNet Producer Portal site.
Available Date	This date is displayed on the FlexNet Producer Portal site and is usually the "official" release date for this version of the product. The Available Date affects whether end users can access the product via an overlap with their entitlement dates.
Archive Date	Once this date has passed the product/version will be moved to the "Archive" tab on the FlexNet Producer Portal site. Users will still be able to download it if they have access through an overlap with their entitlement dates, but will not see it unless they click on the Archive tab on the FlexNet Producer Portal site. (New entitlements with beginning dates after the Expiration date will not have access to this product at all).
Product Manufacturer	A list of configured companies or product groups. Product Manufacturer is configured via the "Configure" menu.
Product Line	Product lines you choose from in this drop down box are specific to your company. Product Line is configured via the "Configure" menu.
End User License Agreement (EULA)	List of configured "click through" agreements which may be associated with a Catalog Item. EULA's are configured through the "Configure" menu. The EULA appears just before the download page in FlexNet Producer Portal.

Table 6-4 ▪ Product Properties

Property	Description
Download Instructions	Supplemental information for the end user. The Product Note is displayed on the Product Download page of the FlexNet Producer Portal site.
Physical Distribution Available	If your site has been configured to integrate with a physical distribution supplier then this attribute indicates that this particular Product is available in a physical medium in addition to the electronic delivery provided by FlexNet Producer Portal.
BIS Classification	Consists of ECCN, ENC, CCATS codes. In order for FlexNet Producer Portal to enforce U.S. Dept. of Commerce export regulations you must provide information about the encryption levels and export licenses of the product. If you do not provide this information your product cannot be delivered outside of the United States. For more information about the Dept. of Commerce regulations and the meaning of these codes please refer to the Bureau of Industry and Standards web site at http://www.bis.doc.gov/ or contact your company's legal department.

Once you have supplied the required information, you have several choices:

- **Add Product**—Add this Product and go to the **View Product** form for this Product (from which you can continue to edit the Product).
- **Submit & Add Another Product**—Add this Product and then go to a new pre-populated **Add Product** screen from which you can begin entering a new Product.
- **Submit & Continue to Add File**—Add this Product and go to the **Add File** form.
- **Submit & Continue to Associate File**—Add this Product and go the the **Associate File** form where you can associate an existing file with this Product.
- **Submit & Copy Product to Catalog Item**—Add this Product and go to a **Add Catalog Item** form which is pre-populated with the relevant information from this Product (useful where you will have only one product per Catalog Item).

View Product

The **View Product** screen is accessed either by searching for and selecting an existing Product or by creating a new Product.

The **View Product** screen displays the current values for the particular Product’s attributes. This screen also shows the File(s) associated with this Product. Clicking on a File Description will take you to that File's **View File** page.

Where Used

The **Where Used** function displays a list of all of the Catalog Items with which this Product is associated.

Clicking on the name of a Catalog Item within this list will take you to the **View Catalog Item** screen from which you can also manage the Catalog Item

Edit Product

Once you have selected a Product, you can click on **Edit** to make changes to the Product attributes.

The **Edit Product** form behaves much like the **Add Product** form and allows you to modify all of the product information except the **Product ID**. If you need to change the "**Product ID**" use the **Reidentify (ReID)** form.

Edit File List (Sort Files)

The **Edit File List** form displays all of the files associated with this Product and allows you to create and edit the file sort order.

- The files that are part of this product will be sorted in ascending order according to the numeric values you enter here.
- If no sort order is specified or when more than one file has the same Sort Order number, then the files will be sorted in the alphabetical order of the File Short Description.
- The file sort order only applies to this Product, so the same File used in more than one Product may have a different sort order value in different Products.

The **Edit Files** form also allows you to indicate which, if any, of the files in this Product should ignore download limits inherited from the Catalog Item.

Associate/Disassociate: Associate File

When you associate a file to a product you are indicating that the file is to be included within the product. If you choose **Associate File** you will be prompted to either enter the catalog item ID(s) or conduct a search for the Catalog Items(s) that you want to associate with this product. All files which match your search criteria will be displayed.

Click on the check box of the one(s) you want to associate to the product and then click the **Associate** button on the bottom of the form. The files(s) you selected will be added to the list of **Files in this Product**.

You can also add a specific file to one or more products by using **Associate To Product** from the **FILE** menu.

Associate/Disassociate: Disassociate File

When you disassociate a file from a product you are indicating that the file is no longer included within the product. The **Disassociate File** form lists any files currently associated with this product.

To disassociate one or more of these files from the selected product click on the **Disassociate?** check box next to the item(s) and then click on the **Disassociate** button at the bottom of the form. There is also a **Disassociate ALL files from this Product** option at the bottom of the form which allows you to disassociate all the files currently associated to the product without actually checking the **Disassociate?** check box.

Associate/Disassociate: Associate to Catalog Item

When you associate a product to a catalog item you are indicating that the product is included within the catalog item. The **Associate to Catalog** function allows you to associate this product to one or more catalog items.

You will be prompted to either enter the catalog item ID(s) or conduct a search for the catalog items(s) that you want to associate with this product. All Catalog Items which match your search criteria will be displayed.

Click on the check box of the one(s) you want to associate to the Product and then click the **Associate** button on the bottom of the form. An existing customer with access to the Catalog Item would have immediate access to new products associated to the Catalog Item.

You can also add the Product to a specific catalog item by using **Associate Product** from the **CATALOG** menu.

Associate/Disassociate: Disassociate from Catalog Item

When you disassociate a product from a catalog item, you are indicating that the product is no longer included within the catalog item. Disassociating a product from a Catalog Item effectively cancels any access to the product which was based on entitlement to the catalog item.

When you select this item you are presented with a list of all the catalog items to which this product is associated. Click on the **Disassociate?** check box of any catalog item(s) from which you wish to disassociate this product.

There is also a **Disassociate ALL Catalog Items from this Product** at the bottom of the form which allows you to disassociate all the products currently associated to the catalog item without actually checking the **Disassociate?** check box. An existing customer with access to the product previously would not longer have access to the product disassociated from the Catalog Item.

Associate/Disassociate: Associate Where

If you do not want to explicitly select the catalog items to which you want a product associated, you can tell the Producer Portal to use this product wherever some other product is already being used. In other words, you can associate a product with all the catalog items with which another product is associated.

When you click on **Associate Where** you will be presented with a product search screen. You can use the "*****" wildcard to search for and select the product which will serve as the template for associating this product with catalog items.

Note ▪ *Note that the **Associate Where** function will update all Catalog Items that contain the template Product unless the Catalog Item is a "non-Subscription" item. In order to associate a Product with a non-Subscription Catalog Item you must explicitly make the association.*

Reidentify (ReID) Product

If for some reason you need to change the Product ID (Part number) of a product that already exists in the the Producer Portal system, you can do so by selecting **Reidentify** once you have selected a Product. The **Reidentify** form prompts you for a new Product ID.

Copy Product

If you want to create a new Product that is very similar to an existing one you can use the **Copy** function on the Product menu.

The **Copy** function will copy the values of all of the attributes of the original Product into the corresponding fields of a new **Add Product** form. You can then make any changes necessary to distinguish the new Product from the original and then save the new Product.

Copy to Catalog Item

Clicking on **Copy to Catalog Item** will take you to a new **Add Catalog Item** form in which the Item ID, Name, Manufacturer, and Product Line are pre-populated with the values from the corresponding fields in this Product. You will need to provide the additional required fields in order to create the Catalog Item.

This function is useful when you expect to have a 1:1 relationship between Products and Catalog Items.

Notify

The **Notify** function allows you to provide email text which will be sent to all users who have an entitlement which includes this Product. You will provide the subject line and the text of the email message. Email messages are queued by the Producer Portal and processed by the Revenera Operations Team. You may also use this form to send any special handling instructions to the Revenera Operations team.

View Emails

Select **View Emails** to display all Update Notification emails related to the Product. Click on an individual System Email ID to view a particular email message.

If no Emails exist for the Product, the system will display a status message to that effect.

File

The following sections describe the **File** area of the **Package Products** section of the Producer Portal.

- Search Files
- Add File
- View File
- Where Used
- Edit File
- Upload File
- Associate to Product
- Disassociate From Product
- Associate Where

- Reidentify (ReID) File
- Notify
- View Emails

Search Files

Files have a number of attributes which you can use to locate the file(s) you are interested in:

Table 6-5 ▪ Search Files Attributes

Attribute	Description
File ID	Unique value by which your company identifies individual files. The File ID may come from a release management or source code control system.
System File ID	Unique identifier assigned by the the Producer Portal system when a new File object is created
File Description	The name of the file that the user sees on the download page. File Description is not case sensitive.
File Status	you can search all files, files for which an image has been loaded, or files for which an image hasn't been loaded.
File Name	Actual system level name of the file, e.g., installer_2_7.zip

The **Search Files** function is not case sensitive (except the **File Description**) and supports the use of the "*" character as a wildcard.

***Note ▪** Wildcards cannot be used for System ID fields.*

If your search criteria match more than one File, then you are given the opportunity to choose the one you are looking for from a list of those matching your criteria.

Once you have selected a File, you can use the **FILE** menu to:

- **Edit File**—Edit the File information. See Edit File.
- **Upload File**—Upload a file (that is, upload the actual bits associated with this File object). See Upload File.
- **Where Used**—Find all the Products where this File is used (Where Used). See Where Used.
- **Associate to Product**—Associate the File with one or more Products. See Associate to Product.
- **Inactivate/Reactivate**—Inactivate/Reactivate the File.
- **Associate Where**—Instruct the Producer Portal to associate this File with all the Products which some other File is associated with (e.g., use `Widget_2_1.ReadMe.txt` wherever `Widget_2_1.exe` is found). See Associate Where.

Add File

Files are what the end user actually downloads. Files which are part of the same release are grouped together into one or more Products which are in turn entitled through Catalog Items.

To add a file to the Producer Portal you provide the following information:

Table 6-6 ▪ Add File Properties

Property	Description
File ID	Unique value by which your company identifies individual files. The File ID may come from a release management or source code control system.
File Description	The name of the file that the user sees. It should be brief but descriptive, such as "Enterprise Server 2.4 Solaris" or "Enterprise Server 2.4 Documentation"
File name	The Name of the as it will appear in FlexNet Producer Portal. ***Note ▪*** *During the upload of a File, this field will be overwritten with the name of the file that is being uploaded.*
Content Detail	Additional information that is displayed when the end user clicks on the **Estimated Time and Details** link on the download page of the FlexNet Producer Portal site. You can use the **Long Description** to give additional installation or compatibility hints or to provide detailed information about the contents of the file. ***Note ▪*** *If the file you provide is in a .zip or .jar format, then the Producer Portal will overwrite the contents of this field with the zipinfo during a File Upload.*

Once you have supplied the required information, you have several choices:

- **Add File**—Add this file and go to the **View File** form for this file (from which you can continue to edit the file).
- **Submit & Add Another File**—Add this file and then go to a new pre-populated **Add File** screen from which you can begin entering a new file
- **Submit & Continue to Upload File**—Add this file and go to the **Upload File** form.

View File

The **View File** screen is accessed either by searching for and selecting an existing File or by creating a new File.

The **View** screen displays the current values for the particular File's attributes.

Where Used

The **Where Used** function displays a list of the Products which use this File.

Clicking on the name of a Product within this list will take you to the **View Product** screen from which you can manage the Product.

Edit File

Once you have selected a File, you can click on **Edit** to modify the File's attributes

The **Edit File** form behaves much like the **Add File** form and allows you to modify much of the File information. The **File ID** can be changed through the **ReIdentify File** screen.

Note ▪ *Some fields are maintained by the Application and can not be changed by the User.*

Upload File

You can upload the actual File Image to an existing the Producer Portal File object by selecting **Upload File** from the **FILE** menu

The **Upload File** form displays the details of the File object you are uploading the File Image to. There are two ways to Upload the File:

- **HTTP Upload**—Click the **Browse** button to select the File that resides on your local file system or enter the path to the File (relative to your computer). When you click on **Upload File from Local File System**, the file will be uploaded to the Producer Portal system.
- **FTP Upload**—If the File is already loaded onto Revenera's FTP server, enter the filename and location.

  Note ▪ *You do not need to specify the FTP server name in the location, only directories that you may have created on the ftp server.*

  When you click on **Upload File from Flexera FTP Server**, the file will be uploaded to the the Producer Portal system.

  Note ▪ *Uploaded files can not be downloaded until the **Download Available?** field in the **View File** page in the Producer Portal indicates **Yes**.*

Associate to Product

The **Associate to Product** function allows you to associate this File with one or more Products.

When you click on **Associate to Product**, you are presented with a **Product Search** screen. You can use the "*" wildcard to search for and select the Product(s) that you want to add this File to. All Products matching your search criteria will be displayed.

Click the checkbox next to each Product that you want this File Associated with and then click on the **Associate Files** button to submit the form.

Disassociate From Product

Disassociating a File from a Product means that users will no longer have access to that file(s) through the Product.

When you select **Disassociate from Product**, the Producer Portal will display a list of all the Products with which this File is associated. Click the **Remove** check box for all the Products from which you want this File disassociated and then click the **Disassociate** button at the bottom of the form.

Associate Where

In some cases, you do not want to explicitly select the Products to which you want this File associated. As an alternative you can tell the Producer Portal to use this File wherever some other File is already being used. That is, associate this File with all the Products with which another File is associated.

When you click on **Use Where**, you will be presented with a **File Search** screen. You can use the "*" wildcard to search for and select the File(s) which will serve as the template for associating this File with Products.

Note* ▪ *The* Use Where *function will update all Products which contain the template File.

Reidentify (ReID) File

Use the **Reidentify** form to change the File ID.

If for some reason you need to change the File ID of a file that already exists in the the Producer Portal system, you can do so by selecting **ReID** once you have selected a file. The **Reidentify** form prompts you for a new File ID or you can choose to leave it blank.

Notify

The **Notify** function allows you to provide email text which will be sent to all users who have an entitlement to a product(s) which includes this File. You will provide the subject line and the text of the email message. Email messages are queued by the Producer Portal and processed by the Revenera Operations Team.

You may also use this form to send any special email handling instructions to the Revenera Operations team.

View Emails

Select **View Emails** to display all Update Notification emails related to the File.

Click on an individual System Email ID to view a particular email message. If no Emails exist for the File, the system will display a status message to that effect.

Configure

The **Configure** menu selection on the **Package Products** tab allows you to manage Product Lines, Manufacturers, License Groups and Agreements. The following sections describe the **Configure** area of the Package Products section of the Producer Portal.

- Product Lines
- Manufacturers
- License Groups
- Agreements
- Licensing

Product Lines

The following sections describe how to manage **Product Lines**:

- List Product Lines
- Add Product Line
- View Product Line
- Edit Product Line

List Product Lines

When you select **Product Lines** on the **CONFIGURE** menu, the Producer Portal displays a list of all the Product Lines your company has configured.

Click on the Product Line name to view the Product Line information, and if necessary, modify it.

Add Product Line

When you select **Product Lines** from the **CONFIGURE** menu, you also have the option of adding a new Product Line by clicking on **Add Product Line**. You will be prompted to enter a unique Product Line ID, a Product Line Name, and a Description of the features of the Product Line. The description of the features will be displayed on the Product page of the FlexNet Producer Portal site.

Catalog Items and Products are both associated with Product Lines which are used as part of the navigation on the FlexNet Producer Portal site.

View Product Line

The **View Product Line** screen is accessed from the **List Product Lines** screen. It displays the current values for the particular Product's attributes.

Edit Product Line

Once you have selected a Product Line, you can click on **Edit** to make changes to the Product's attributes.

Manufacturers

The following sections describe how to manage **Manufacturers**:

- List Manufacturers
- Add Manufacturer
- View Manufacturer
- Edit Manufacturer

List Manufacturers

Manufacturer is the highest level of organization of products within your FlexNet Producer Portal site.

Many companies only use a single Manufacturer, though others use the Manufacturer attribute to distinguish between different product groups or families.

When you select **Manufacturers** on the **CONFIGURE** menu, the Producer Portal displays a list of all the Manufacturers your company has configured. Click on the Manufacturer name to view the Manufacturer information, and if necessary, modify it.

Add Manufacturer

When you select "**Manufacturer**" from the **CONFIGURE** menu you also have the option of adding a new Manufacturer by clicking on **Add Manufacturer**.

You will be prompted to enter a unique Manufacturer ID, a Manufacturer Name. If a user of your FlexNet Producer Portal site is entitled to products from more than one Manufacturer then the list of Manufacturer Names will be the first level of navigation on the site.

View Manufacturer

The **View Manufacturer** screen is accessed from the **Manufacturers** screen. It displays the current values for the particular Manufacturer's attributes.

Edit Manufacturer

Once you have selected a Manufacturer, you can click on **Edit** to make changes to the Manufacturer's attributes.

License Groups

The following sections describe how to manage **License Groups**:

- List License Groups

- Add License Group
- View License Group
- Edit License Group

List License Groups

License Groups (also called Serial Pools) identify the blocks of license or serial numbers that will be assigned to a particular set of products.

There are two basic ways that FlexNet Producer Portal handles license keys:

- You supply the license information when you create the entitlement, or
- FlexNet Producer Portal generates a license either using an algorithm that your company has provided or by pulling licenses from a pool which you have provided.

In either case, you need to create a License Group and associate it with Catalog Items which require license keys. In the case that FlexNet Producer Portal is generating the license, your company also needs to provide additional information to Revenera. If this hasn't already been done, please contact your Client Relations Manager to begin the process.

You can click on the System License Group ID to view and edit the License Group Name.

Add License Group

When you select **License Group** from the **CONFIGURE** menu, you also have the option of adding a new License Group by clicking on **Add License Group**. You will be prompted to enter a License Group Name which will appear in the drop down box on the screens where you maintain Catalog Items.

Once you have added a License Group, you can begin using it to identify license keys which you supply through the **Entitle Account** form. If you want FlexNet Producer Portal to automatically generate license keys for you, then you must set this up through your Client Relations Manager before FlexNet Producer Portal can begin issuing licenses.

View License Group

The **View License Group** screen is accessed from the **List License Groups** screen. It displays the current values for the particular License Group's attributes.

Edit License Group

Once you have selected a License Group, you can click on **Edit** to make changes to the License Group's attributes.

Agreements

The following sections describe how to manage **Agreements**:

- List Agreements

- Add Agreement
- View Agreement
- Edit Agreement

List Agreements

Agreements are most commonly used as End User License Agreements (EULA's) also known as “click-wrap” or “click-through” agreements.

You can click on the **Agreement Name** to view and edit the **Agreement Name** or the **Agreement Text**.

Add Agreement

When you select **Agreement** from the **CONFIGURE** menu, you also have the option of adding a new Agreement by clicking on **Add Agreement**.

You will be prompted to enter an Agreement Name which will appear in the drop down box on the screens where you maintain products. You will also enter text which will be displayed to the end user the first time he selects each product which is associated with this agreement.

View Agreement

The **View Agreement** screen is accessed from the **List Agreements** screen. It displays the current values for the particular Agreement's attributes.

Edit Agreement

Once you have selected an Agreement you can click on **Edit** to make changes to the Agreement's attributes.

Licensing

The following sections describe how to manage **Licensing**:

- String Replacement for FlexNet Embedded Licensing
- String Replacement for FlexNet Publisher Licensing

String Replacement for FlexNet Embedded Licensing

Detailed instructions follow this quick reference for the model.

Data Model

The following table is a quick reference for the model.

Table 6-7 ▪ Data Model

Item	Subitems
account (both types)	• iid (number) • id • name • udfs (hash)
partner (both types)	• name
manufacturer (order line type)	• name
productLine (order line type)	• name
orderLine (order line type)	• order • iid (number) • id • orderDate (date) • poNumber • udfs (hash) • catalogItem • iid (number) • id • name • udfs (hash) • quantity (number) • effectiveDate (date) • expirationDate (date) • activationCode • udfs (hash)

Table 6-7 ▪ Data Model

Item	Subitems
device (device type)	• alias • model • name • description • series — name — description
fulfillmentDate (datetime) (both types)	
mappedQuantity (number) (order line type)	

The *iid* property is the internal (System) ID of the owning entity.

FlexNet Embedded License model string replacement uses FreeMarker with the above data model and the value from the license model as the template. The full FreeMarker manual is a useful reference, but some examples and a quick guide will be provided here.

Examples

- `Licensed to ${account.name}`
- `minutes=${orderLine.udfs["MINUTES"]}`
- `${device.model.series.name}`
- `${fulfillmentDate?date?string.short}`
- `${account.udfs["TIER"]!"Basic"}`

General Comments

Not all parts of the data model are available for all license models. For example, `${device}` will be missing in an order line license model, and `${orderLine}` will be missing in a device license model. Remember also that if a device is unassigned, then `${account}` will be null when trying to generate the base license for that device.

UDFs are accessed through a hash property of the object on which the UDF is set. The key to the hash is the UDF code. Some of the above examples demonstrate usage.

As you may guess from the examples, FreeMarker interpolation is triggered by `${}` enclosing an expresssion. Expressions use dotted path notation to navigate a data model.

It is an error to call for something that is missing. (Null and unset are both interpreted as missing.) That error will cause a failure to generate the license. However, FreeMarker gives control over this behavior. If you want to proceed without error when a value is missing then you can use ! as in the last example. The FreeMarker manual gives details.

Dates, times, and numbers use default formatting, but the templating system gives control over the format. Note that a date does not have a time. This is different from a timestamp, which has a date and a time. Values which are dates, times, or numbers are called out in the data model reference above. Although formatting is highly configurable, the most common use cases will probably be served by the built-in date formats.

String Replacement for FlexNet Publisher Licensing

FlexNet Publisher allows for String Replacement to enable dynamic content into your licenses. This dynamic content is allowed both on the License Template and the License Variation, wherever you see "Fixed Value (with string replacement)". The tags below can be used to insert dynamic content.

Table 6-8 ▪ List of Tags

Tag	Content
`[[PARTNER_NM]]`	Your Company Name
`[[ACCOUNT_ID]]`	Account ID
`[[ITRA_ACCOUNT_ID]]`	System Account ID
`[[ACCOUNT_NM]]`	Account Name
`[[ACCOUNT_UDF code='the code of the UDF']]`	The value of the Account UDF, Single quotes!!
`[[ORDER_ID]]`	Entitlement ID
`[[ITRA_ORDER_ID]]`	System Entitlement ID
`[[PO_NUM]]`	PO Number
`[[ORD_UDF code='the code of the UDF']]`	The value of the Order UDF, Single quotes!!
`[[ENTL_DUR]]`	Difference (in number of days) between the orderline expiration date and effective date
`[[ORD_LN_UDF code='the code of the UDF']]`	The value of the Order Line UDF, Single quotes!!
`[[ACTIVATION_CODE]]`	(FNP Trusted Storage only) The activation code of the Order Line
`[[CAT_DSCR]]`	Catalog Item Description
`[[CAT_ID]]`	Catalog Item ID
`[[CAT_UDF code='the code of the UDF']]`	The value of the Catalog Item UDF, Single quotes!!
`[[PROD_DSCR]]`	Product Name
`[[PROD_VER]]`	Product Version

Table 6-8 • List of Tags

Tag	Content
`[[PRODUCT_UDF code='the code of the UDF']]`	The value of the Product UDF, Single quotes!!
`[[USER_FIRST_NM]]`	First Name of the user generating the license
`[[USER_LAST_NM]]`	Last Name of the user generating the license
`[[USER_EMAIL]]`	Email Address of the user generating the license
`[[LIC_QTY]]`	Quantity of the License
`[[SERIAL_NUM]]`	Serial Number as generated by the application
`[[HOST_ID]]`	Host ID
`[[HOST_NM]]`	Host Name
`[[HOST_DSCR]]`	Host Description
`[[HOST_TYPE_PREFIX]]`	Prefix of the host id (like "INTERNET")
`[[YYYYMMDDHHMMSS]]/[[YYYYMMDD]]`	Date or Date Time Stamp of license generation
`[[PARAM code='code']]`	(FNP Trusted Storage only) Typical use is to capture information that came through in the `VendorDictionary` during an activation call. The code needs to exactly match the key in the `VendorDictionary` (case sensitive). `Single quotes!!Example` `VENDOR_STRING="Longitude=[[PARAM code='Longitude']]"`
`[[LIC_DEF_NM]]`	License Definition Name

Product Management Support

This section includes the following to provide more insight on product management support:

- Temporary Catalog Items
- Treatment of Export Classification Control Numbers (ECCNs)
- Revenera Export Compliance Overview
- Deliver to Account
- Product Set Up and Management
- Load File Options

Temporary Catalog Items

To better support trial downloads, you can create temporary Catalog Items that become unavailable when the associated entitlement expires. If you have any questions, please contact your Revenera Account Manager or Project Manager.

By default, FlexNet Operations LLM makes all product software historically available to an end-user. In other words, a user will always be able to access older versions of their software, regardless of the expiration status of the software maintenance contract. If you want to modify this behavior, for example for a trial download, you can mark Catalog Items as “temporary.” Once an entitlement to a temporary Catalog Item expires, the associated products and files are no longer available to the users on that entitlement.

Considerations for Using Temporary Catalog Items

If you would like to use Temporary Catalog Items, please consider the following:

- You can set the Catalog Item Temporary indicator through FlexNet Operations LLM Producer Portal or via the XML / Web Services APIs.
- The Catalog Item Subscription indicator should be set to **Yes**. The temporary indicator has no meaning for non-subscription Catalog Items, because they never expire.
- You must provide the default duration for temporary Catalog Items.
- If no expiration date is provided on an entitlement for a temporary Catalog Item, the system determines the expiration date based on the default duration of the temporary Catalog Item.
- Once the expiration date is reached, FlexNet Operations LLM removes access to the temporary Catalog Item from end users’ accounts.
- To re-enable access to the Catalog Item, you can:
    - Extend the duration of the entitlement by changing the expiration date.

      OR
    - Submit a new entitlement to the same Catalog Item.

If you have any questions, please feel free to contact your Revenera Account Manager or Project Manager for assistance.

Treatment of Export Classification Control Numbers (ECCNs)

Important *▪ The functionality of the Software Delivery software is to play a part of your export compliance programs but is not the sole methodology to be used for your export compliance program for your go to market solutions. You should review your export compliance program further with your export legal counsel.*

The following table displays the valid ECCN, License Exception, and Commodity Classification Automated Tracking System (CCATS) code combinations to comply with the Bureau of Industry and Security's (BIS) export rules.

Table 6-9 ▪ ECCN Treatment

ECCN	License Exception	CCATS	Export Rules
Unknown			NO exports. Delivery to United States addresses only.
EAR99	NLR	Self-Classified or Gxxxxxx	Exportable to all but the embargoed/ terrorist countries (Cuba, Iran, North Korea, Sudan, Syria, Crimea region of Ukraine)
3D002	TSR	Self-Classified or Gxxxxxx	Exportable with a written letter of assurance to Country Group B. All other destinations require an export license.
3D991	NLR	Self-Classified or Gxxxxxx	Exportable to all but the embargoed/ terrorist countries (Cuba, Iran, North Korea, Sudan, Syria, Crimea region of Ukraine)
4D993	NLR (General Rule)	Self-Classified or Gxxxxxx	Special rules for China, Russia, and Venezuela: An export license is required if: • The software is “program” proof and validation “software”, “software” allowing the automatic generation of “source codes”, and operating system “software” that are specially designed for real time processing equipment, AND • You know the software is intended is intended, entirely or in part, for a 'military end use' in the People's Republic of China or for a “military end use” or “military end user” in Russia or Venezuela. Otherwise: Exportable to all but the embargoed/terrorist countries (Cuba, Iran, North Korea, Sudan, Syria, Crimea region of Ukraine).

Table 6-9 ▪ ECCN Treatment

ECCN	License Exception	CCATS	Export Rules
4D994	NLR (General Rule)	Self- Classified or Gxxxxxx	Special rules for China, Russia, and Venezuela: An export license is required if: ● The software is specially designed or modified for the “development”, “production”, or “use” of equipment controlled by 4A101, AND. ● You know the software is intended is intended, entirely or in part, for a “military end use” in the People's Republic of China or for a “military end use” or “military end user” in Russia or Venezuela. Otherwise: Exportable to all but the embargoed/terrorist countries (Cuba, Iran, North Korea, Sudan, Syria, Crimea region of Ukraine).
5D001	CIV	Self-Classified or Gxxxxxx	Eligible for export to Country Group D:1 using License Exception CIV. Not eligible for CIV (an export license is required) if the software is classified under ECCN 5D001.a and is “specially designed” for the “development” or “production” of items controlled by 5A001.b.5 and 5A001.h.
5D001	TSR	Self-Classified or Gxxxxxx	Exportable with a written letter of assurance to Country Group B. All other destinations require an export license. Not eligible for TSR if the software is controlled under ECCN 5D001.a and is “specially designed” for items controlled by 5A001.b.5 and 5A001.h.

Table 6-9 • ECCN Treatment

ECCN	License Exception	CCATS	Export Rules
5D991	NLR (General Rule)	Self- Classified or Gxxxxxx	Special rules for China, Russia, and Venezuela: An export license is required if: • The software is specially designed or modified for the “development”, “production”, or “use” of equipment controlled by 5A991.a., 5A991.b.7., and 5A991.f., or of “software” specially designed or modified for the “development”, “production”, or “use” of equipment controlled by 5A991.a., 5A991.b.7., and 5A991.f. AND • You know the software is intended is intended, entirely or in part, for a “military end use” in the People's Republic of China or for a “military end use” or “military end user” in Russia or Venezuela. Otherwise: Exportable to all but the embargoed/terrorist countries (Cuba, Iran, North Korea, Sudan, Syria, Crimea region of Ukraine)
5D002	ENC / 740.17(b)(1)	Self- Classified or Gxxxxxx	Exportable to all but the embargoed/ terrorist countries (Cuba, Iran, North Korea, Sudan, Syria, Crimea region of Ukraine).
5D002 [binary/ object code]	ENC / 740.17(b)(2)	Gxxxxxx	Exportable to: • Non-Government End-Users in all countries. • Government End-Users in Supp3 Countries. • If classified in accordance with Section 740.17(b)(2)(i)(A), the software is also exportable to “Less Sensitive” Government End Users in all countries except embargoed/terrorist countries.

Table 6-9 ▪ ECCN Treatment

ECCN	License Exception	CCATS	Export Rules
5D002 [Source code]	ENC / 740.17(b)(2)	Gxxxxxx	Exportable to: • Non-Government End-Users in all countries. • Government End-Users in Supp3 Countries.
5D002	ENC / 740.17(b)(3)	Gxxxxxx	Exportable to all but the embargoed/ terrorist countries (Cuba, Iran, North Korea, Sudan, Syria, Crimea region of Ukraine).
5D002 Publicly Available Source Code	TSU	Notification Submitted to Commerce	Exportable to all but the embargoed/ terrorist countries (Cuba, Iran, North Korea, Sudan, Syria, Crimea region of Ukraine).
5D002	TMP [BETA under 740.9(c)]		Exportable to all but Iran, North Korea, Sudan, Syria, and the Crimea region of Ukraine.
5D992.c	NLR	Self-Classified or Gxxxxxx	Exportable to all but the embargoed/ terrorist countries (Cuba, Iran, North Korea, Sudan, Syria, Crimea region of Ukraine).

Note ▪ *In the Producer Portal you can restrict downloads to the US and Canada by setting the “Restrict to US/ CANADA (NLR)” option to “Yes”.*

Terms Used in ECCN Treatment

Refer the following terms while using the above table:

Table 6-10 ▪ Terms Used in ECCN Treatment

Term	Description
Military End-Use	The term “military end use" means: incorporation into a military item described on the U.S. Munitions List (USML) (22 CFR part 121, International Traffic in Arms Regulations); incorporation into a military item described on the Wassenaar Arrangement Munitions List (as set out on the Wassenaar Arrangement Web site at http://www.wassenaar.org); incorporation into items classified under ECCNs ending in “A018” or under “600 series” ECCNs; or for the “use,” “development,” or “production” of military items described on the USML or the Wassenaar Arrangement Munitions List, or items classified under ECCNs ending in “A018” or under “600 series” ECCNs. “Military end use” also means deployment of items classified under ECCN 9A991 as set forth in Supplement No. 2 to Part 744.

Table 6-10 ▪ Terms Used in ECCN Treatment

Term	Description
Military End-User	The term “military end user” means the national armed services (army, navy, marine, air force, or coast guard), as well as the national guard and national police, government intelligence or reconnaissance organizations, or any person or entity whose actions or functions are intended to support “military end uses”.
Country Group B	Afghanistan; Albania; Algeria; Andorra; Angola; Antigua and Barbuda; Argentina; Aruba; Australia; Austria; The Bahamas; Bahrain; Bangladesh; Barbados; Belgium; Belize; Benin; Bhutan; Bolivia; Bosnia & Herzegovina; Botswana; Brazil; Brunei; Bulgaria; Burkina Faso; Burundi; Cameroon; Canada; Cape Verde; Central African Republic; Chad; Chile Colombia; Comoros; Congo (Democratic Republic of the); Congo (Republic of the); Costa Rica; Cote d'Ivoire; Croatia; Curaçao; Cyprus; Czech Republic; Denmark; Djibouti; Dominica; Dominican Republic; Ecuador; Egypt; El Salvador; Equatorial Guinea; Eritrea; Estonia; Ethiopia; Fiji; Finland; France; Gabon; Gambia, The; Germany; Ghana; Greece; Grenada; Guatemala; Guinea; Guinea-Bissau; Guyana; Haiti; Honduras; Hong Kong; Hungary; Iceland; India; Indonesia; Ireland; Israel; Italy; Jamaica; Japan; Jordan; Kenya; Kiribati; Kosovo; Kuwait; Latvia; Lebanon; Lesotho; Liberia; Lithuania; Luxembourg; Macedonia, The Former Yugoslav Republic of; Madagascar; Malawi; Malaysia; Maldives; Mali; Malta; Marshall Islands; Mauritania; Mauritius; Mexico; Micronesia, Federated States of; Monaco; Montenegro; Morocco; Mozambique; Namibia; Nauru; Nepal; Netherlands; New Zealand; Nicaragua; Niger; Nigeria; Norway; Oman; Pakistan; Palau; Panama; Papua New Guinea; Paraguay; Peru; Philippines; Poland; Portugal; Qatar; Romania; Rwanda; Saint Kitts & Nevis; Saint Lucia; Saint Vincent and the Grenadines; Samoa; San Marino; Sao Tome & Principe; Saudi Arabia; Senegal; Serbia; Seychelles; Sierra Leone; Singapore; Sint Maarten (the Dutch two-fifths of the island of Saint Martin); Slovakia; Slovenia; Solomon Islands; Somalia; South Africa; South Korea; South Sudan, (Republic of); Spain; Sri Lanka; Surinam; Swaziland; Sweden; Switzerland; Taiwan; Tanzania; Thailand; Timor-Leste; Togo; Tonga; Trinidad & Tobago; Tunisia; Turkey; Tuvalu; Uganda; United Arab Emirates; United Kingdom; United States; Uruguay; Vanuatu; Vatican City; Venezuela; Western Sahara; Yemen; Zambia; and Zimbabwe.
License Exception TSR	Written Letter of Assurance Required (see Section 740.6 of the EAR), then exports authorized to Country Group B.
License Exception CIV	Only available for civil end-users for civil end-uses. An export license is required if you know the software will be or is intended to be exported, reexported, or transferred (in-country) to military uses or military end-users.
Country Group D:1	Armenia, Azerbaijan, Belarus, Burma, Cambodia, China (PRC), Georgia, Iraq, Kazakhstan, Kyrgyzstan, Laos, Libya, Macau, Moldova, North Korea, Russia, Tajikistan, Turkmenistan, Ukraine, Uzbekistan, Vietnam.

Table 6-10 ▪ Terms Used in ECCN Treatment

Term	Description
Government End-Users	A government end user is any foreign central, regional or local government department, agency, or other entity performing governmental functions; including governmental research institutions, governmental corporations or their separate business units (as defined in part 772 of the EAR) which are engaged in the manufacture or distribution of items or services controlled on the Wassenaar Munitions List, and international governmental organizations. This term does not include: Utilities (including telecommunications companies and Internet service providers); banks and financial institutions; transportation; broadcast or entertainment; educational organizations (except public schools and universities); civil health and medical organizations (including public civilian hospitals); retail or wholesale firms; and manufacturing or industrial entities not engaged in the manufacture or distribution of items or services controlled on the Wassenaar Munitions List.
Supp3 Countries	The countries listed in Supplement No. 3 to 15 CFR part 740, currently: Austria, Australia, Belgium, Bulgaria, Canada, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, Latvia, Lithuania, Luxembourg, Malta, Netherlands, New Zealand, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and United Kingdom.

Table 6-10 ▪ Terms Used in ECCN Treatment

Term	Description
"Less Sensitive" Government End Users	The following are considered "less sensitive" government end-users: ● Local/state/provincial "government end users" (departments, agencies and entities), including local/state/provincial executive, legislative, judicial, police, fire, rescue and public safety agencies. ● National/federal/royal "government end users" (departments, agencies and entities) providing the following civil government functions and services: ● Census and statistics services; ● Civil public works infrastructure services (construction, maintenance, repair, regulation and administration) as follows: Buildings, public transportation, roads and highways, trucking; ● Civil service administration and regulation, including human resources and personnel/labor management; ● Clean water infrastructure services (treatment, supply and testing); ● Economic (trade/commerce/investment), business and industrial development, promotion, regulation and administration, excluding the Agencies, departments, boards and councils for science and technology; Research, development and national laboratories (other than as specified measurements and standards services) and meteorology/weather/atmospheric services) of this definition (below); National telecommunications and information technology agencies, boards, councils and development authorities (including national information center, and Information Communications Technology (ICT)/telecommunications infrastructure/ spectrum planning, policy, regulation and testing); ● Elections, balloting and polling services; ● Energy regulation and administration, including oil, gas and mining sectors; ● Environmental/natural resources regulation, administration and protection, including wildlife, fisheries and national parks; ● Food/agriculture regulation and administration; ● Labor/community/social services planning, regulation and administration, including: housing and urban development, municipality and rural affairs; ● Measurements and standards services; ● Meteorology (weather, atmospheric) services; ● National archives/museums; ● Patents; ● Pilgrimage and religious affairs; ● Postal services; ● Public and higher education (excluding government research institutions and any agency, institution or affiliate engaged in the manufacture or distribution of items or services controlled on the Wassenaar Munitions List); ● Public health and medicine/pharmaceutical regulation and administration; ● Public libraries; ● Sports/culture (includes film, commercial broadcasting and the arts) promotion, regulation and administration; ● Travel/tourism promotion, regulation and administration.

Revenera Export Compliance Overview

Important *▪ The functionality of the Software Delivery software is to play a part of your export compliance programs but is not the sole methodology to be used for your export compliance program for your go to market solutions. You should review your export compliance program further with your export legal counsel.*

Revenera exports third party software products as well as its own software products. Deliveries of software outside the United States are subject to the Export Administration Regulations, which are administered by the Department of Commerce Bureau of Industry and Security. In addition to the embargoed/terrorist countries and regions (currently Cuba, Iran, North Korea, Sudan, Syria, and the Crimea region), to which no products may be sold or delivered, a number of United States government agencies maintain lists of individuals and entities to which we are barred from selling or delivering software. We are prohibited from delivering to parties appearing on these lists, whether we are delivering from or to the United States or from or to another country.

To keep track of these constantly changing lists, Revenera uses a service called MK Denial (mkdenial.com). The MK Denial list contains all entity names of individuals who are restricted by various government agencies from obtaining exports. This list is checked regardless of the country.

Revenera's FlexNet Operations Cloud service distinguishes and acts on the different BIS-approved processes, depending on the product classification of a particular software product.

Revenera checks the following data for any individual who initiates a download using the FlexNet Operations Cloud service:

- Member name on MK Denial list.
- Member email address domain – check for country of origin/government.
- Member profile address – check for country of origin/government.
- Account name on MK Denial list.
- IP Address lookup through the third party look up service, ip2location.
- Domain from DNS lookup for IP Address (only used if check number 3 fails).

If any of these checks fail (the export is not allowed), access is denied. When a compliance check fails, an email is automatically generated and sent to an internal email alias and is optionally forwarded directly to a customer designated email address. Revenera then works with our customers to provide the relevant information about the denial.

Deliver to Account

The Deliver to Account feature can be used to either restrict or allow access of Files or Products to designated Accounts. This can be used when you want to distribute Files or Products with custom code or hot fixes to specific Accounts and do not want to change your product hierarchy. If you have any questions, please feel free to contact your Revenera Software Account Manager or Project Manager for assistance.

FlexNet Operations LLM Producer Portal users with the **Product Management** or **Deliver to Account** permission can restrict or grant File or Product access to designated Accounts. To do so, the File or Product must be associated to a Catalog Item that the Account is entitled to. The Deliver Product to Account feature does not take the place of entitlements in general; it simplifies the process and eliminates the need to set up a separate Catalog/Product/File for a one-off delivery of custom code or a hot fix/patch.

The following steps are recommended in using the **Deliver to Account** feature:

1. Load the File using FlexNet Operations LLM Producer Portal or the XML API
2. Restrict Deny or Restrict Allow access of the File or Product to the appropriate Accounts
3. Associate the File to the Product and Product to Catalog Item
4. Generate notification email (if desired)

You should follow these steps in the order listed above to ensure that access is not granted to everyone for the period of time that it takes to you complete the restriction.

The examples that follow illustrate how to use Deliver to Account to restrict or allow access for a Product and File to designated Accounts from FlexNet Operations LLM Producer Portal.

- Deliver Product to Account
- Deliver File to Account

Deliver Product to Account

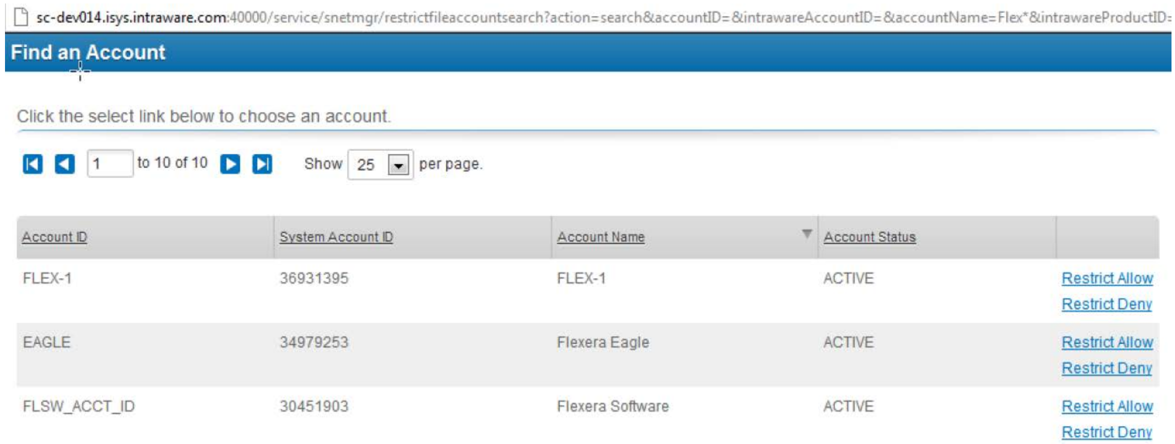
To deliver a product to an account, perform the following steps.

Task ***To deliver a product to an account:***

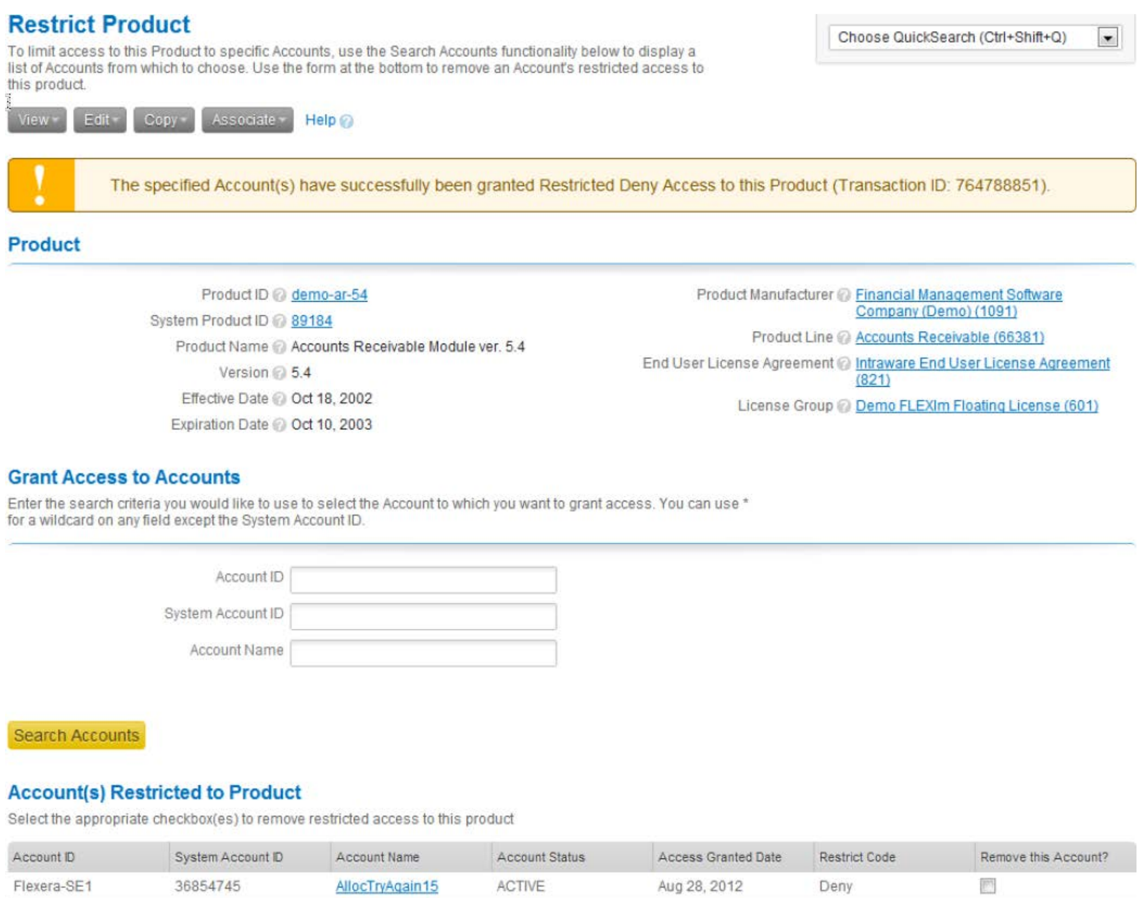
1. From the **View Product** screen in the Producer Portal, select the **Restrict** option from the **Edit** menu to access the **Restrict Product** page as highlighted by the red arrow below:

   The **Restrict Product** page enables you to search for Account ID, Intraware Account ID, and Account Name.

2. Once you obtain your search results, select either **Restrict Allow** or Restrict **Deny** next to the Account to which you would like to change access for. The following shows the search results on the **Restrict Product** page:

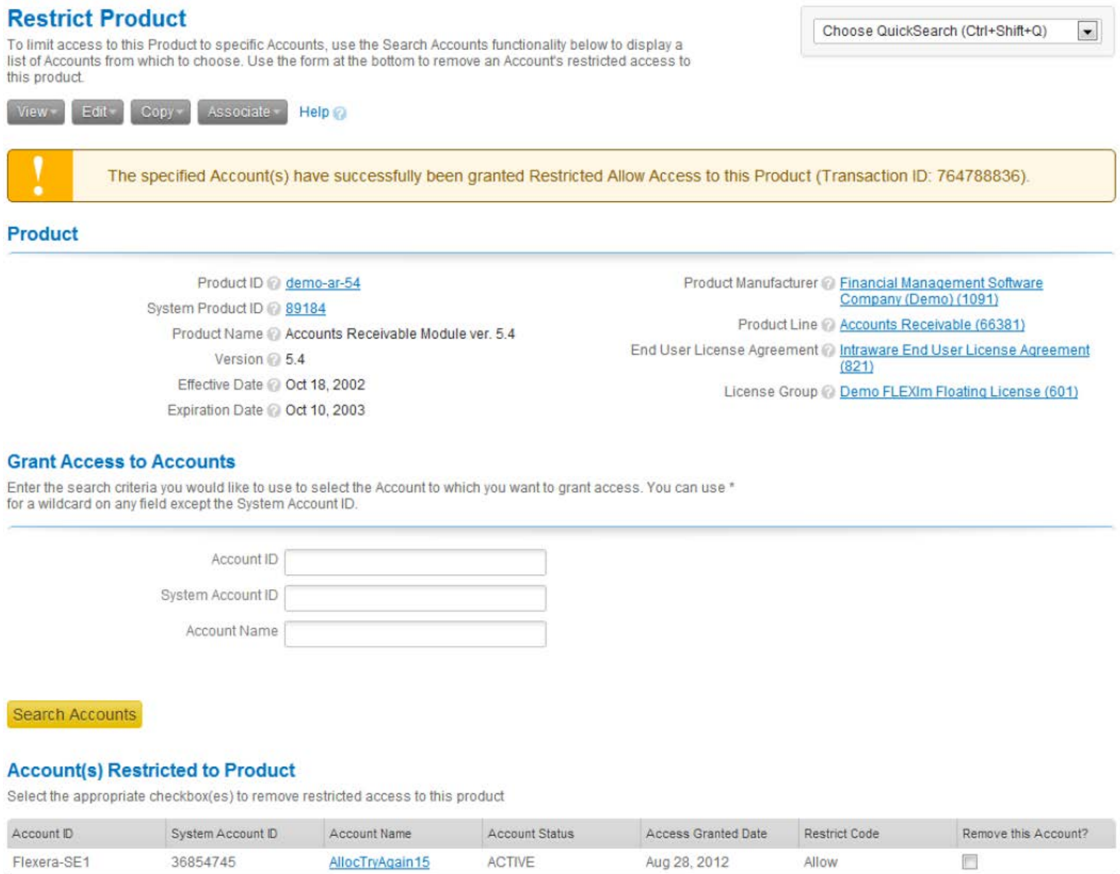


If you select the **Restrict Deny**, you will see the following screen:



All accounts that are entitled to this Product will have access to it except for the accounts you choose to the **Restrict Deny** access.

If you select the **Restrict Allow**, you will see the following screen:



Only the Account chosen above will have access to this product. All other Accounts that previously had access to this Product will have access removed if you choose to the **Restrict Allow** access***

The Restricted Product flag on the View Products page is now “Yes.”

The **Restrict Product** pages shown above also allow you to remove previously selected Accounts.

Deliver File to Account

To deliver a file to an account, perform the following steps.

Task ***To deliver a file to an account:***

1. Once you have loaded the File, from the **View File** screen in the Producer Portal, select the **Restrict** option from the **Edit** menu to access the **Restrict File** page as highlighted by the red arrow below:

   The **Restrict File** page enables you to search for Account ID, Intraware Account ID, and Account Name.

2. Once you obtain your search results, select either **Restrict Allow** or **Restrict Deny** next to the Account to which you would like to change file access for.

   - If you chose **Restrict Allow**, the Account(s) that you selected will now have access to the File, and the File is restricted to only those Account(s) in the list.
   - If you chose **Restrict Deny**, the Account(s) that you selected will not have access to the file. Please note that the Restricted File flag is now **Yes**.

The **Restrict File** page also allows you to remove previously selected Accounts.

Note ▪ *Make sure to associate the File to a Product that is associated to a Catalog item for which the Account(s) selected have an entitlement. For example, if it is a hot fix for Product A, Version 1.0, which is delivered via an entitlement to Catalog Item Product A, you need to associate the file to Product A, Version 1.0 and ensure that the selected Account(s) have an entitlement to Product A.)*

If you have any questions, please feel free to contact your Revenera Account Manager or Project Manager for assistance.

Product Set Up and Management

The Revenera FlexNet Operations LLM service offers considerable flexibility in how to set up product hierarchy. This document:

- Describes typical options for product hierarchy
- Recommends methods to optimize the planning and set up of products.
- Defines the best practice for processing transactions, and describes the required process flow for transactions by type (web form, web services, or XML). These processes apply to both initial product set up and updates in FlexNet Operations LLM Producer Portal.

This section describes general product management concepts and definitions. The following are the key factors to consider when you determine the appropriate management of your products:

- Product Set Up Concepts
- Date Management
- Display Management and Product Hierarchy
- Recommendations for Creating a Product Hierarchy
- Steps in the Set Up and Management of Products

Product Set Up Concepts

FlexNet Operations LLM uses four primary objects to control the delivery of digital goods:

Table 6-11 ▪ Primary Objects to Control Delivery of Digital Goods

Object	Description
Entitlements (orders)	• Use entitlements to grant customers access to software. • Entitlements contain data that specify elements of the order, such as account, quantity, effective date, etc. • Entitlements reference catalog items.
Catalog items (price list items)	• What a manufacturer sells, for example, a product or a maintenance agreement. • Have attributes such as default duration, whether the catalog item includes updates (maintenance). • Catalog items reference one or more products.
Products (product releases)	• What the manufacturer wants delivered, for example, a specific version of a product. • Have attributes such as export licenses, version number, platform, or archive dates. • Products reference one or more files.
Files (images)	• Actual software files that the end user downloads, for example, the installation executable for a particular platform. • A file may be associated to one or more products. • Access to a file may be restricted by account.

Date Management

There are two basic ways that a user gets access to the manufacturer's product:

- **Through a new entitlement to a catalog item** which has one or more products associated with it, or

- **Through a new product update to a subscription-based catalog item** to which the user was previously entitled (see Figure 1 below.)

For subscription catalog items, which products the end user sees on their FlexNet Operations LLM site is determined by the effective dates defined for the product(s) and the effective period specified on the entitlement to the corresponding catalog item. The overlap between effective and expiration dates of the product and of the entitlement determines which product(s) the end user will have access to (see Data Management and its Relationship to Entitlements below.)

Typically, once the user has been given access to a product he will continue to have access indefinitely. However, the manufacturer may wish to limit the duration of access (temporary products, temporary catalog items), for example for evaluation software, or limit the number of downloads of one or more of the files (download-limited products.)

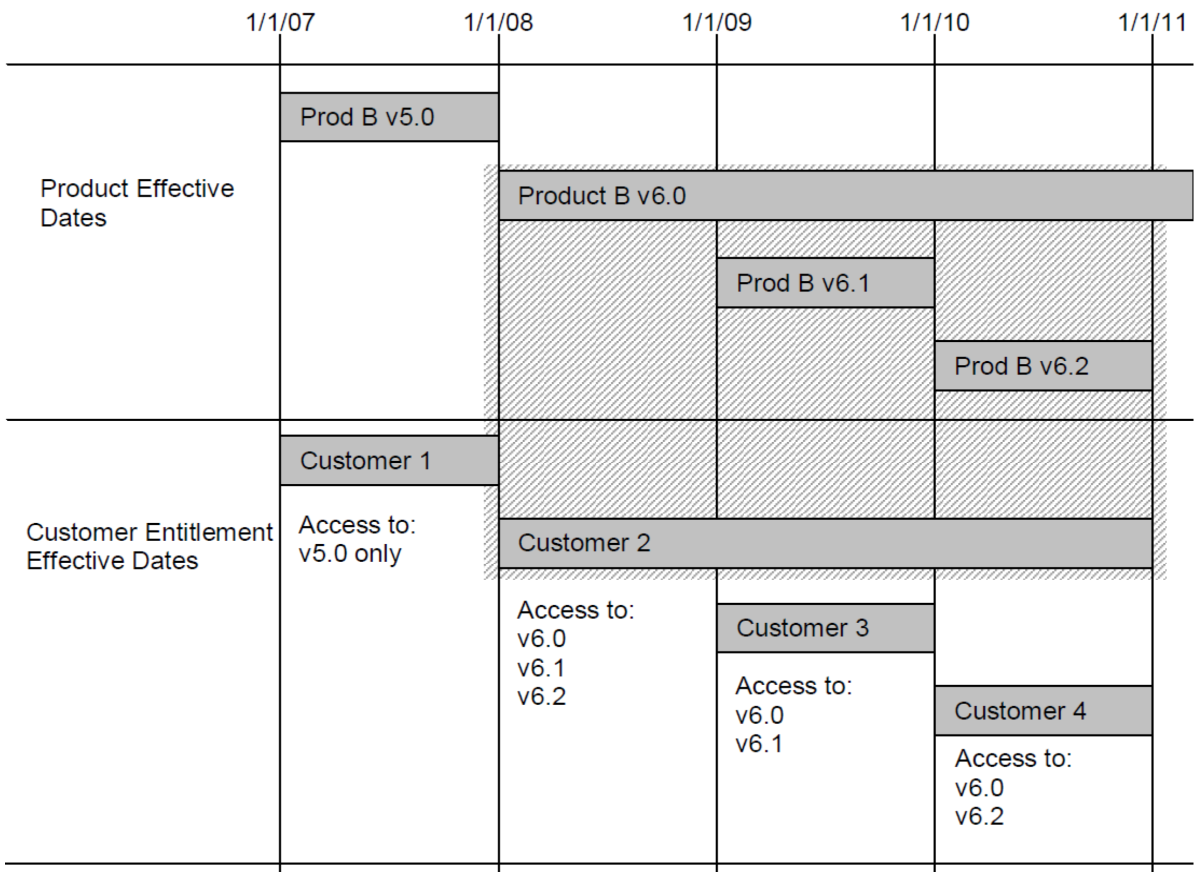


Figure 6-1: Data Management and its Relationship to Entitlements

To effectively set up the product hierarchy, you should understand the significance of dates on product items and entitlements. Date management is illustrated best by two model types, the non-subscription and subscription models.

- Non-Subscription Model
- Subscription Model

Non-Subscription Model

Customer 1 has an entitlement to a catalog item for a specific version of a product, which does not grant future access to new product/bug fixes/patches automatically. The Subscription attribute on catalog item is set to No.

Subscription Model

For subscription catalog items, the products the end user sees on their FlexNet Operations LLM site are determined by the effective dates defined for the product(s) and the effective period specified on the entitlement to the corresponding catalog item. The Subscription attribute on catalog item is set to Yes. The products to which the end user has access are determined by the overlap between the effective and expiration dates of the product and the entitlement.

- Customer 2 has a three-year entitlement to a catalog item for the term 1/1/08-1/1/11. On 1/1/08, the customer has access to the current version of Product B version 6.0. On 1/1/09, version 6.1 becomes available and customer gains access to it. On 1/1/10, version 6.2 becomes available to the customer. The customer has access to all three versions because the product effective dates fall within the range of this customer’s entitlement period.
- Customer 3 has one year entitlement to a catalog item for the term 1/1/09-1/1/10. On 1/1/09, the customer has access to the current versions of Product B v6.0 and v6.1, because the Product effective dates fall within the range of this customer’s entitlement period.
- Customer 4 has one year entitlement to catalog item for the term 1/1/10-1/1/11. The duration of this customer’s entitlement allows access to Product B v6.0 and v6.2.

Generally, access remains indefinitely, unless you limit the duration of access by using the Temporary attribute on the catalog level. For example, you may want to limit access for evaluation software. You can also choose to limit the number of downloads of one or more of the files by using the Default Max Download Limit attribute on the catalog item. Access to a product is driven by the following:

- A new entitlement to a catalog item.
- A product update to a subscription catalog item.
- For subscription catalog items, access to software is determined by the overlap between:
    - Effective dates of the product.
    - Effective dates of the entitlement.

Display Management and Product Hierarchy

For the purposes of end-user navigation, FlexNet Operations LLM supports a product hierarchy based on attributes associated with catalog items, products, and files. The following are the commonly used hierarchy:

- Manufacturer or product family
- Bundle or suite
- Product line
- Version
    - Platform
    - Language

- Release number

- Optional product-specific end user license agreement the user must accept before reaching the download page.
- Component files (for example, documentation, executables, etc.).

These attributes are used to build a hierarchical site in which the user selects the file(s) he wants to download by choosing among the values at each level. For example, select the appropriate platform version.

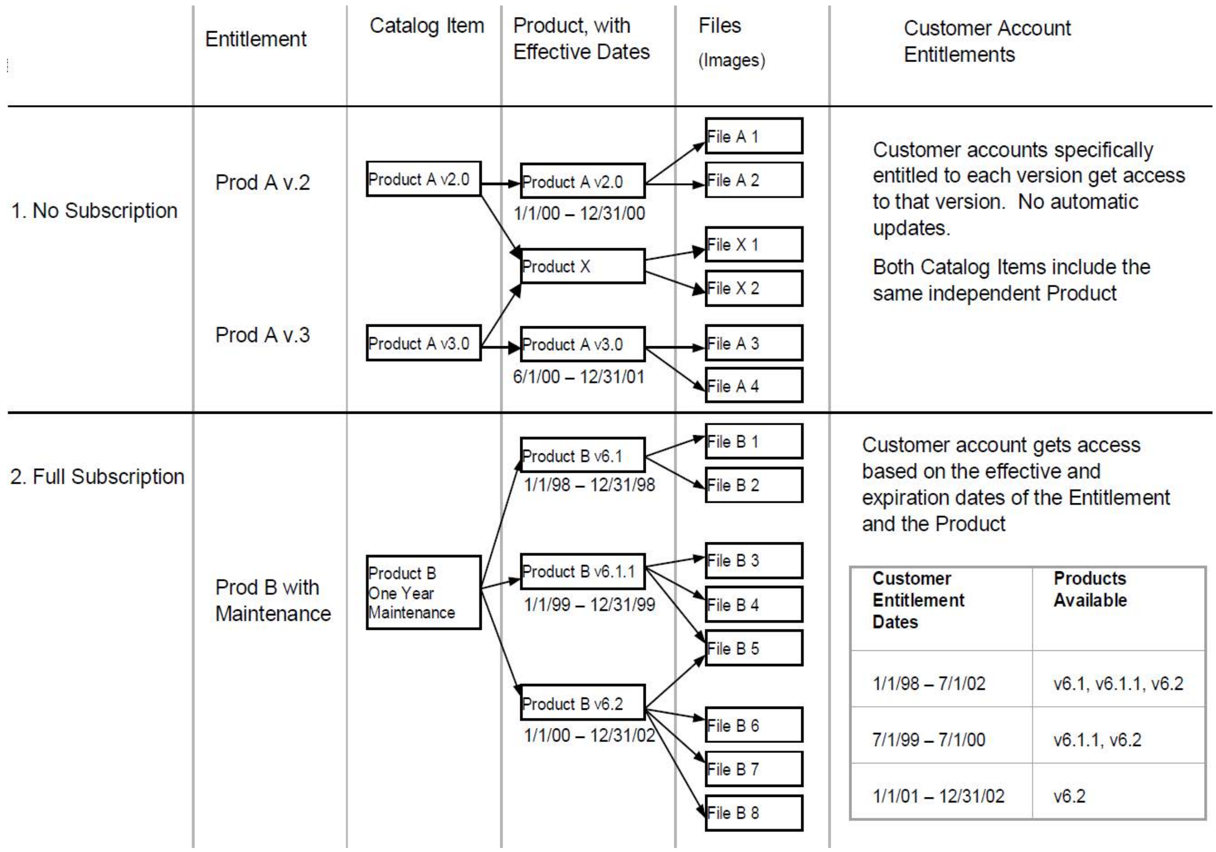


Figure 6-2: Non-Subscription and Subscription Models Illustrating How a Product Hierarchy is Set Up for Each Model Type

Recommendations for Creating a Product Hierarchy

This section includes the following sub-sections for more insights:

- Products and Files
- Product Families, Bundles, Product Lines
- Catalog Items
- Summary Recommendations

Products and Files

The first decision in setting up a product hierarchy for FlexNet Operations LLM is to determine how granular the product level should be. For example, if your product is available on multiple platforms should those platform versions be different products in FlexNet Operations LLM, or should they simply be different executable files associated with the same product? As a general rule, if you want to use an attribute to be able to sell a product differently (or control access to it) then it must be represented at the product level.

Because product releases (versions) are generally date-related, and because effective and expiration dates are key attributes of a product, Revenera strongly recommends that different releases be set up as different products.

The files that are associated with a product should be organized to strike an optimal balance between providing the end user with the minimum number of downloads and keeping the download files as small as possible. Revenera recommends that all documentation be pulled together and made available as a single downloadable file (zipped or otherwise) since we have found that users frequently want to download just the documentation. Readme files may be kept separate to enable the end user to quickly access a high level overview of the software and its functionality prior to completing any product downloads. The base set of software should also be collated into a single file so that the user can successfully install the product without having to download multiple files. If platforms and languages are not treated as separate products then they should be packaged into different files to reduce the size of the file(s) that the user has to download in order to install the product on a particular system.

Product Families, Bundles, Product Lines

The purpose of product families, bundles, and product lines is to allow the manufacturer to create navigation which mirrors the sales and marketing descriptions and organization of your company's product set. As a general guideline, you will want to set up your product hierarchy so that most users have between three and seven choices at each level. This approach reduces the number of "clicks" required to select a product but still keeps the FlexNet Operations LLM screens clear and readable.

Catalog Items

Generally you will create a catalog item for each item on your price list which has electronically deliverable components. You then associate one or more products with each catalog item.

The most common and most generally useful approach is to create subscription catalog items, which include ongoing product updates (maintenance). This type of catalog item is not version specific. It may include more than one product, each of which will be updated separately based on the effective and expiration dates of the product and the entitlement to the catalog item. It is not necessary to create a separate catalog item for the initial sale, which includes one year maintenance and the subsequent sale of maintenance agreements, since these catalog items will behave the same way. However, if you want to maintain a 1:1 mapping between your price list and the catalog items, you can create different catalog items with ID's and names which correspond to your "initial sale" and "maintenance" price list items.

Under certain circumstances the manufacturer may also want to create catalog Items which specifically exclude updates (non-subscription catalog items), or make the associated products unavailable after the expiration date of the entitlement (temporary products), for example to deliver beta or evaluation versions.

Summary Recommendations

Consider the following:

- Use as few levels of hierarchy as possible to reduce the number of “clicks”.
- Catalog items should not be version specific and should include updates.
- Major releases should be treated as separate products.
- Files should be bundled together to create single downloads for documentation and standard installations.

Steps in the Set Up and Management of Products

This section describes the best practices to set up each component. This recommended sequence of data transactions to complete catalog, product, and file data setup optimizes the process for data management.

There are four data transaction methods:

- FlexNet Operations LLM Producer Portal web forms for manual data entry
- XML data feed transactions for automated data entry
- Batch upload of XML-formatted file
- Web services

For example, you can convert .csv data templates into XML format with Revenera’s IXP Tool, and then upload the XML file through FlexNet Operations LLM Producer Portal.

Table 6-12 ▪ Steps in the Set Up and Management of Products

Steps	Task	FlexNet Operations On-Demand Producer Portal Web Form	XML Transaction/ Web Services API
Step 1	**Add Manufacturer** Standard feature, required field for catalog and product items (multiple manufacturers are uncommon).	Product Management > Configure > Manufacturers	Add Manufacturer
Step 2	**Add Product Line(s)** Standard feature, required field for catalog and product items.	Product Management > Configure > Product Lines	Add Product Line
Step 3	**Add Agreement(s)** Standard feature, optional field for product Items. HTML formatting required.	Product Management > Configure > Agreements	Add Agreement (not available using web services)

Table 6-12 ▪ Steps in the Set Up and Management of Products

Steps	Task	FlexNet Operations On-Demand Producer Portal Web Form	XML Transaction/ Web Services API
Step 4	**Add License Group(s)** Standard feature. Optional field for catalog items. Allows transmission of license key with entitlement transaction data. The key will appear in the **License Key** tab on the End User Portal.	Product Management > Configure > License Groups	Add License Group Add License to Pool (used if bulk loading licenses to a pool)
Step 5	**Add Catalog Item** An entitlement to a catalog item will give the end user access to a single product or a suite of products in conjunction (overlap) with an active maintenance period. The status of catalog items (active or inactive) can be changed to reflect your current pricelist.	Product Management > Add Catalog Item	Add Catalog Item
Step 6	**Add Product** One product can be associated to multiple catalog items. If you have a catalog item as a stand-alone license and a catalog suite that contains multiple stand-alone products, it is possible to create a single product to associate to both the stand-alone catalog item and catalog suite. When conducting an update, both the stand-alone and suite can receive the update at the same time if desired. (Refer to Optional Steps - Mass Updates)	Product Management > Add Product	Add Product
Step 7	**Product Association** (Product-to-Catalog association)	Product Management > View Product > Assoc > Associate to Catalog Item	Add Product to Catalog Item

Table 6-12 ▪ Steps in the Set Up and Management of Products

Steps	Task	FlexNet Operations On-Demand Producer Portal Web Form	XML Transaction/ Web Services API
Step 8	**Add File** One file can be associated to multiple products. If your binary packaging supports multiple platforms, we recommend loading a single file with a description to indicate cross platform support instead of loading the file binary ten times with ten descriptions. We recommend using maximum compression when creating file binaries to create the smallest file size possible.	Product Management > Add File	Add File
Step 9	**Upload File** Transfer the file binaries (CD images) to the ESD repository. If you are using the FTP server to store files, the system scans for files older than 10 days (UAT and Production) and deletes them. The system does not verify the file was loaded into FlexNet Operations LLM Producer Portal before deleting it.	Product Management > Add File > Upload File There are three methods: HTTPS, FTP (files must first be loaded to FTP staging server), High Speed Upload (requires installing browser plug-in; download by clicking high speed plug-in link).	Load File Image (not available as a web service)
Step 10	**Optional - Restrict File** Refer to Deliver to Account for details on how to use the **Deliver to Accounts - Restricting a File** functionality.	Product Management > View File > Edit > Restrict	Restrict File (not available as a web service)
Step 11	**File Association** (File-to-Product association)	Product Management > View File > Assoc > Restrict Associate to Products	Add File to Product
Step 12	**Review / QA the Set Up**	View catalog item, click into the product Item, and click the file to confirm "loaded" status. Verify file-to- product and product-to - catalog associations are accurate.	

Optional Steps - Mass Updates

This section describes how to use FlexNet Operations LLM Producer Portal to mass update existing catalog items with a new product Item. For example, you have five different catalog items and each contains the same Product Version 1. You have added Product Version 2 and want to make it available to anyone with access to Product Version 1. This shortcut method will allow you to mass associate a product across multiple catalog items.

Table 6-13 ▪ Mass Updates

Update Subscriptions	This function is available from FlexNet Operations LLM Producer Portal	
Step 1	**Associate Where** This function from the product menu allows you to add the new Product ID (in the example, the ID for the new version 2.0) to all catalog items containing an existing Product ID (the ID for version 1.0). This function is used to update multiple catalog items containing the same Product ID with a single transaction.	Product Management > Search Product > Associate / Disassociate submenu > Associate Where

Optional Steps - Update Email Notifications

This section describes how to notify existing members with active status and active entitlement that there is new product to download. Once you complete the step to update existing catalog items, Optional Steps - Mass Updates, you may use this method to send an update notification email. This method allows you to send an email to Members with an existing entitlement without having to process new entitlements for the new version of product.

Table 6-14 ▪ Update Email Notifications

Update Email Notifications	This function is available from FlexNet Operations LLM Producer Portal
Step 1	**Create the email using search criteria to generate a distribution list:** **1.** From FlexNet Operations LLM Producer Portal, go to the **Email** tab. **2.** Select **Create Update Notification Email by Product**. **3.** In the field, **Enter Product IDs of Products to Create a Notification**, specify the Product ID(s) relevant to the content for the notification email. You may also use the search page on the lower half of the screen to find and select your products. Click **Submit**. **4.** You can use the next display page to enter **Distribution List Options** for the email list you are about to generate: effective date of an entitlement, include expired entitlements, or exclude emails of a particular domain. Click **Submit**. **5.** While the list is being generated by the system, you see the **View Email** display page.

Table 6-14 ▪ Update Email Notifications

Update Email Notifications	This function is available from FlexNet Operations LLM Producer Portal
Step 2	**Edit the content and distribution list, if necessary:** 1. From the **Email** toolbar, select **Edit Email** to access the text/HTML fields, to enter/update specific content to the Product release. (The template from Setup is the starting point for the standard/generic content.) 2. Once you create text/HTML content, select the appropriate **Preview** button from the bottom of the display page. Click **Save** when you are done formatting and entering content. 3. HIGHLY recommended: **Send Preview Email** to yourself. 4. If necessary, you may add/remove members from the distribution list. For example, you may want to CC yourself or an email alias at your company. Select **Edit Distribution List** from the **Email** toolbar 5. Add additional email addresses in the field provided, or check the delete box on an existing email address to remove, click **Submit**.
Step 3	**Queue and Send the Email:** 1. From the **Email** toolbar, select **Send Email**. 2. From the **Send Email** display page you have the option to **Send Immediately** (highly recommended) or **Queue to be sent later in the day or on another day**. Generally, you will send the email immediately after you are done editing the email. Click **Submit**. 3. FlexNet Operations LLM Producer Portal has a short period where the system validates email addresses before actually sending the email externally. If you return to the **View Email** display, you can see that the **Status** of the email is changed to **Sent**, to indicate that the email job is complete. This page does not automatically refresh; you may need to go to the **Email** toolbar and select **View Email** to refresh the display screen.

About URLs in the Update Notification Emails

The Update Notification email notifies users of specific product or file changes. By design, the URL in the email takes user to a landing page that displays only the specified product/file associations available at the point the email was generated. Therefore, all products/files must be set up completely prior to generating an Update Notification. If you associate a product/file to entitlements after generating an Update Notification email, the landing page URL from the email content will not display the product/file that was added later in the process. If a user navigates to the End User Portal without using URL links from an Update Notification email, the user will see the normal display for all product/file entitlements.

Summary

We have reviewed the components of data set up that are required to manage the concepts of date and display management. The defined data transaction types and sequence of events illustrated the required processes to manage data in FlexNet Operations LLM Producer Portal. You should follow these best practices to effectively create and manage a full product hierarchy for new entitlements and update subscriptions.

Load File Options

If supported through your implementation, you can upload Files into the Producer Portal to be available for download. This document describes the different upload the assumption that the File metadata has already been added to the Producer Portal (**AddFile**).

Enabling User to Load Files

To allow a user to load files, a Producer Portal Administrator must first assign the **Product Management (PDCT)** or **Deliver to Account (RSTF)** permission to the appropriate Producer Portal users as shown below:

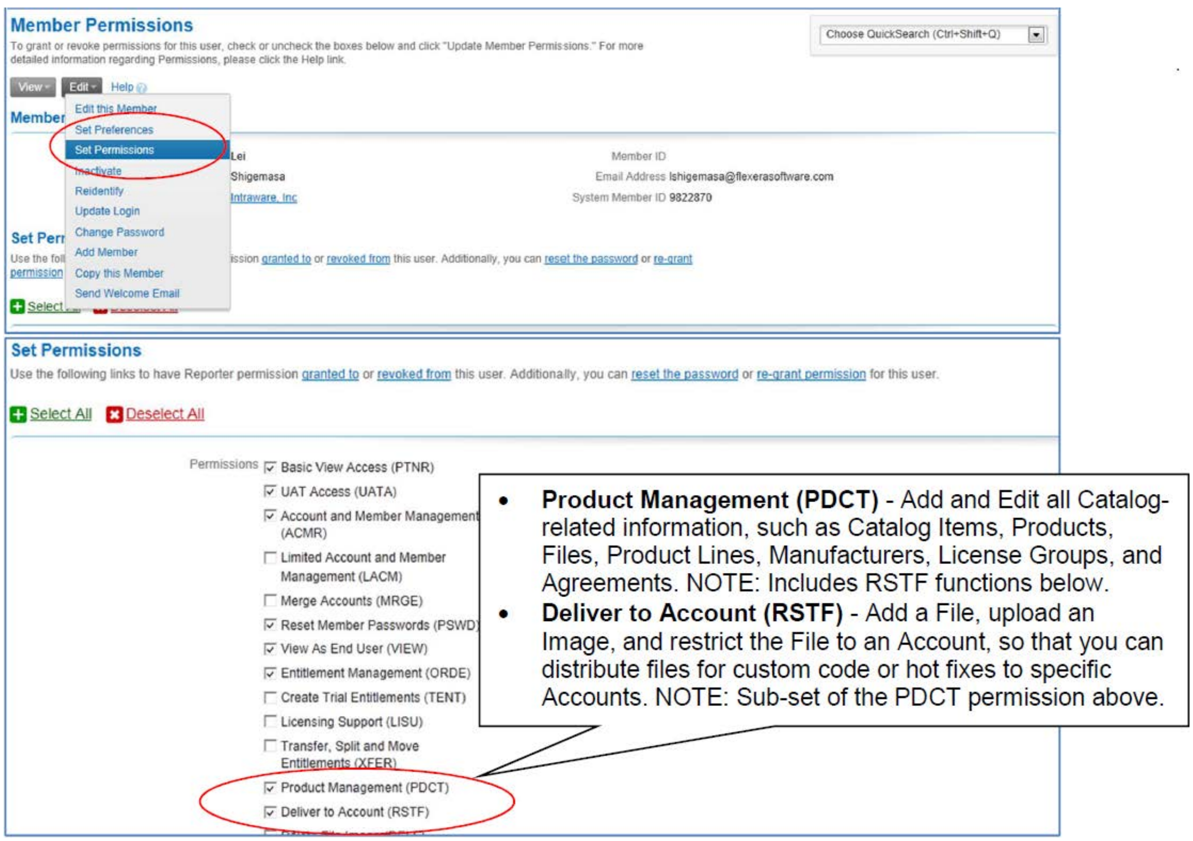


Figure 6-3: Product Management (PDCT) and Deliver to Account (RSTF) Permissions

Producer Portal users with appropriate permissions can upload files using one of the following methods:

- **Upload File Page**—The following tabs on the **Upload File** page can be used to load the individual files from the Producer Portal:
    - **HTTP**
    - **FTP**
    - **Remote FTP**
    - **High Speed Upload**

- **Upload Manager**—Revenera client that will both Add File and Upload File with images from the Revenera upload server
- **Converter Template**—Spreadsheet to load a batch of UploadFile transactions
- **Transactions**—UploadFileImage with either XML or WebServices protocol

All fields described to upload a File are mandatory except the Expected MD5 Checksum. When the MD5 Checksum is supplied the application will fail the transaction if the actual MD5 does not match.

The File Size, MD5 value and File Name are derived after a File has successfully been uploaded.

***Note** ▪ Uploaded files cannot be downloaded until the **Download Available?** field in the **View File** page in the Producer Portal indicates yes.*

The following provides more insight about the methods (mentioned above) to upload the files:

- Upload File Page
- Upload Manager
- Converter Template
- Transactions

Upload File Page

In the Producer Portal, locate the file you wish to upload and from the **View File** page, select **Edit > Upload File**.

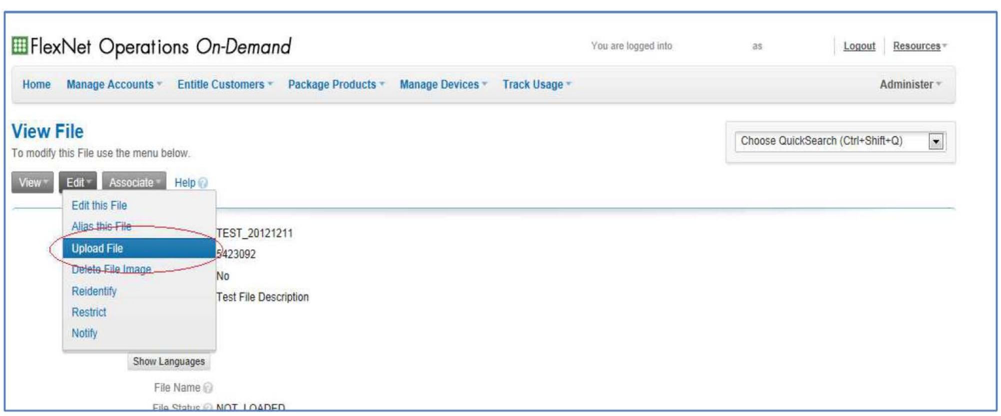


Figure 6-4: Edit > Upload File Option

The **Upload File** page opens.

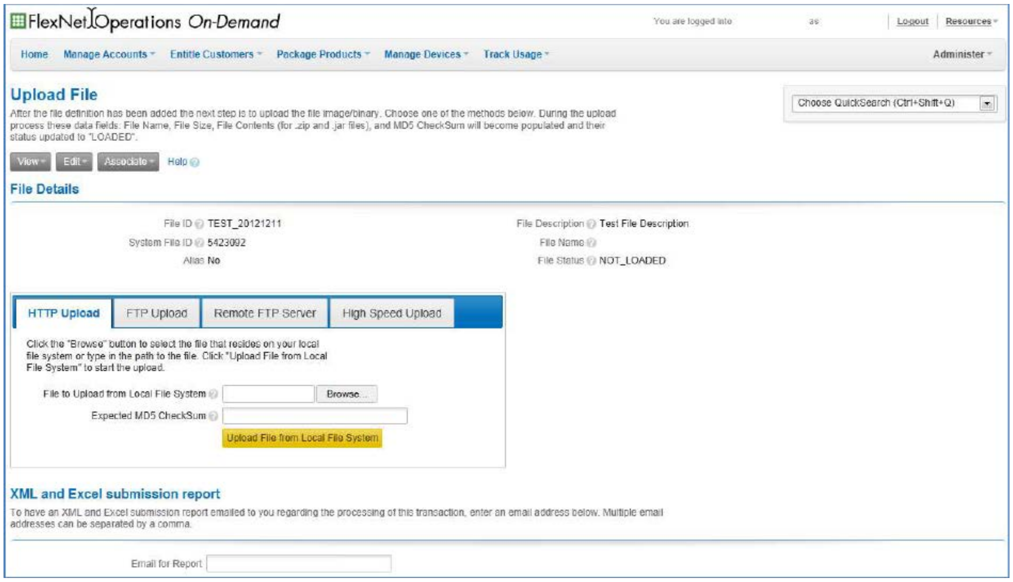


Figure 6-5: Upload File Page

You can upload the individual files by using the following tabs on this page:

- HTTP Upload
- FTP Upload
- Remote FTP Server
- High Speed Upload

HTTP Upload

File images residing at a location local to the end user's machine can be loaded from the Producer Portal **Upload File** page via the browser. The following displays the **HTTP Upload** tab selected:

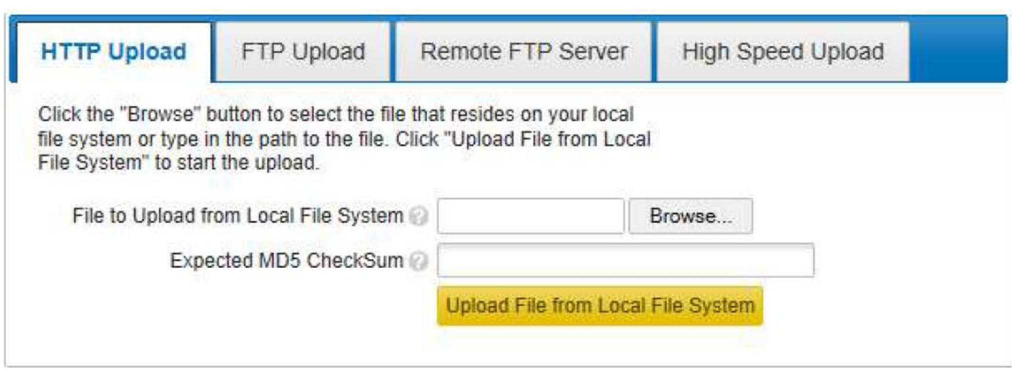


Figure 6-6: HTTP Upload Tab of Upload File Page

FTP Upload

File images previously loaded the Revenera FTP upload server can be loaded from the Producer Portal Upload File page. The following displays the list of files in the **Browse FTP** box on the **FTP Upload** tab selected:

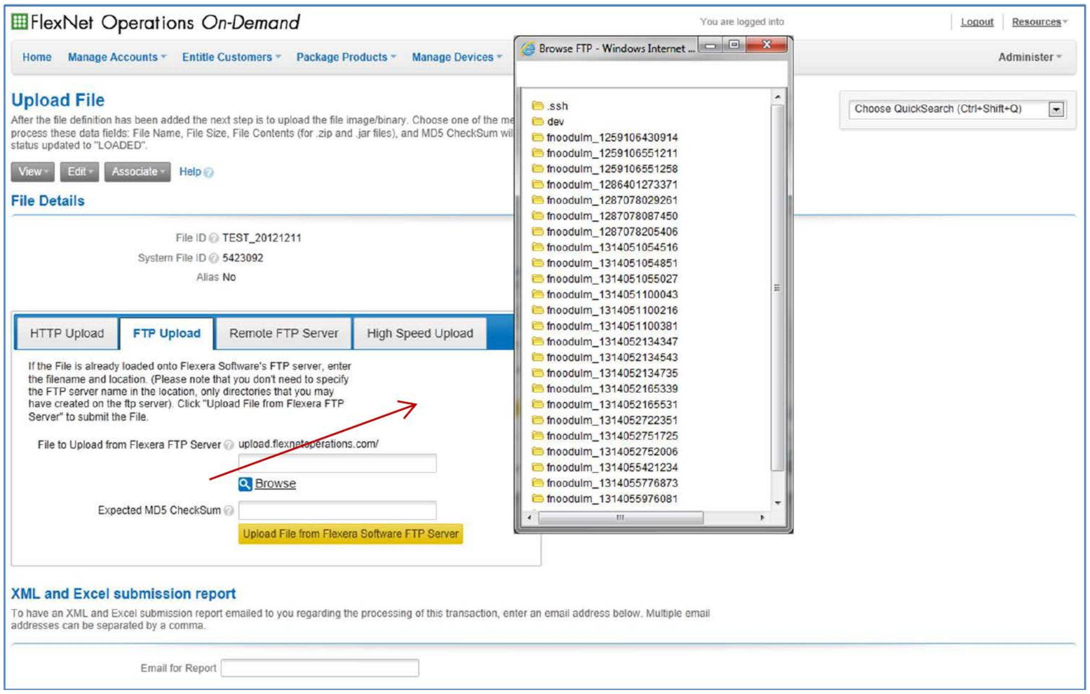


Figure 6-7: FTP Upload Tab of Upload File Page

The Revenera FTP upload servers mentioned below are temporary staging servers only and not intended for long term storage.

- **Production**—`upload.flexnetoperations.com`
- **UAT**—`uploaduat.flexnetoperations.com`

Credentials to access these upload servers would have been provided with your initial implementation. There is a cleanup script that will delete file images from these upload servers after they have been there for 30 days.

When Files are loaded into the Producer Portal using file images posted on the Revenera FTP upload server, they are automatically removed from the server after successfully loaded into the application.

Remote FTP Server

File images located on a remote non-Revenera FTP Server can be loaded from the Producer Portal Upload File page. The following displays the **Remote FTP Server** tab selected:

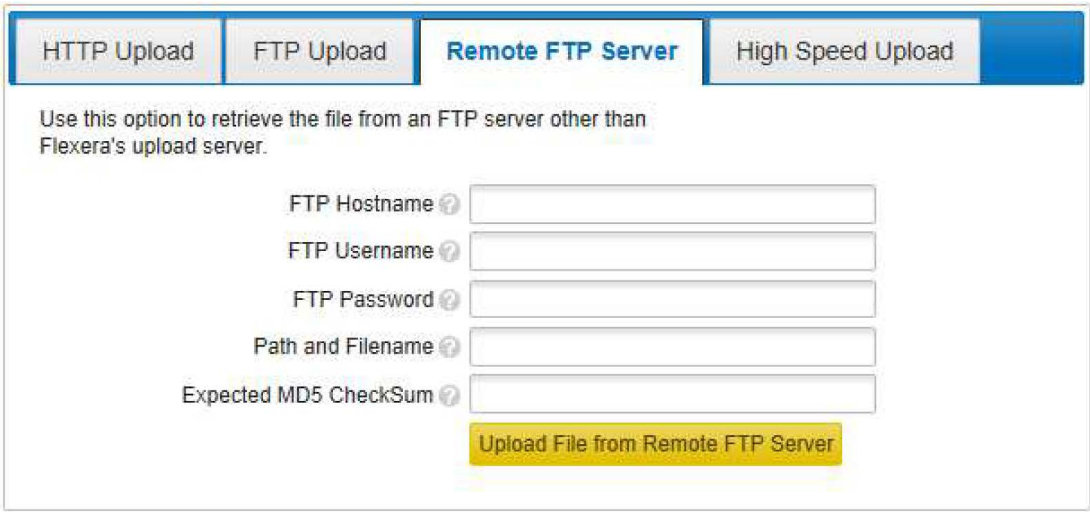


Figure 6-8: Remote FTP Server Tab of Upload File Page

The application will pull the file from the remote FTP location specified. It requires that username and password information be supplied in the transaction to enable access to the Remote FTP server:

```
ftp://[username]:[password]@[hostname]/[path and filename]
```

Only the FTP protocol is supported, not FTPS, HTTP or HTTPS.

If the FTP server allows for anonymous access, the username and password do not need to be supplied and If an FTP username and password are provided, they will be logged as an "*" to avoid exposing the credentials.

To address issues with special characters, you need to URLencode the components of the URL before placing them in the XML transaction.

High Speed Upload

File images residing at a location local to the end user's machine can be loaded from the Producer Portal Upload File page via the browser using the Aspera plugin. The following displays the **High Speed Upload** tab selected:

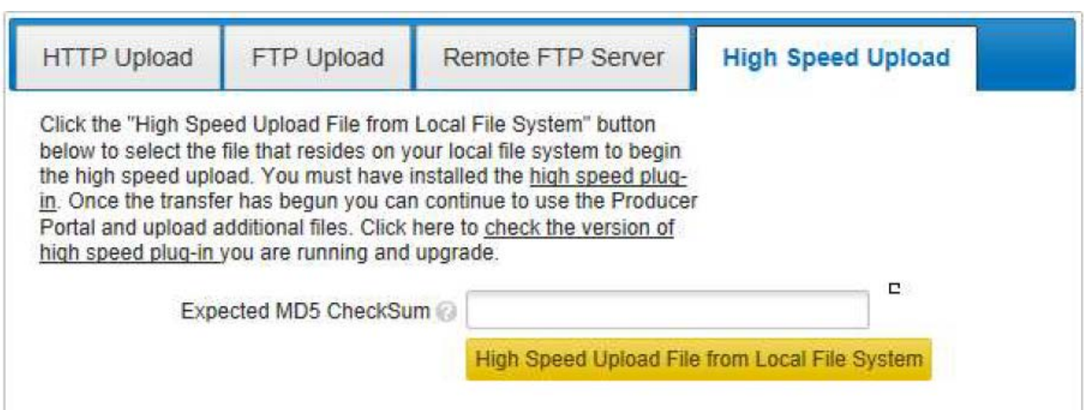


Figure 6-9: High Speed Upload Tab of Upload File Page

Upload Manager

The Upload Manager will allow you to load the file from the Revenera upload will result in adding File metadata along with loading of the File image.

Located in the **Producer Portal** > **Package Products** > **Files** > **Upload Manager**. The following displays the **Upload Manager** option selected:

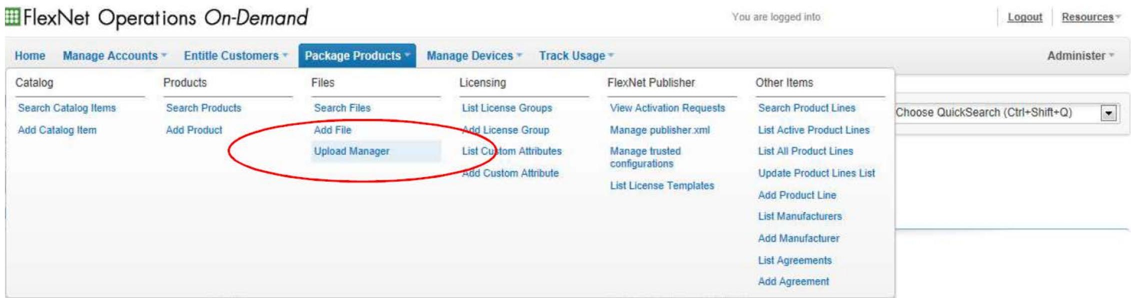


Figure 6-10: Upload Manager

You will be prompted to login to the Revenera upload server:

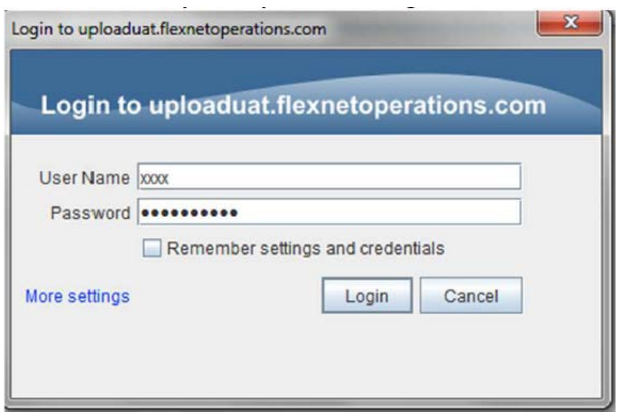


Figure 6-11: Login to Upload Server

Once you've logged in, you can drop files from the server to the **Add Files** section of the Upload Manager. This will prompt you for File ID which will create a new File in the Producer Portal and include the File image. The following displays the **Upload Manager**:

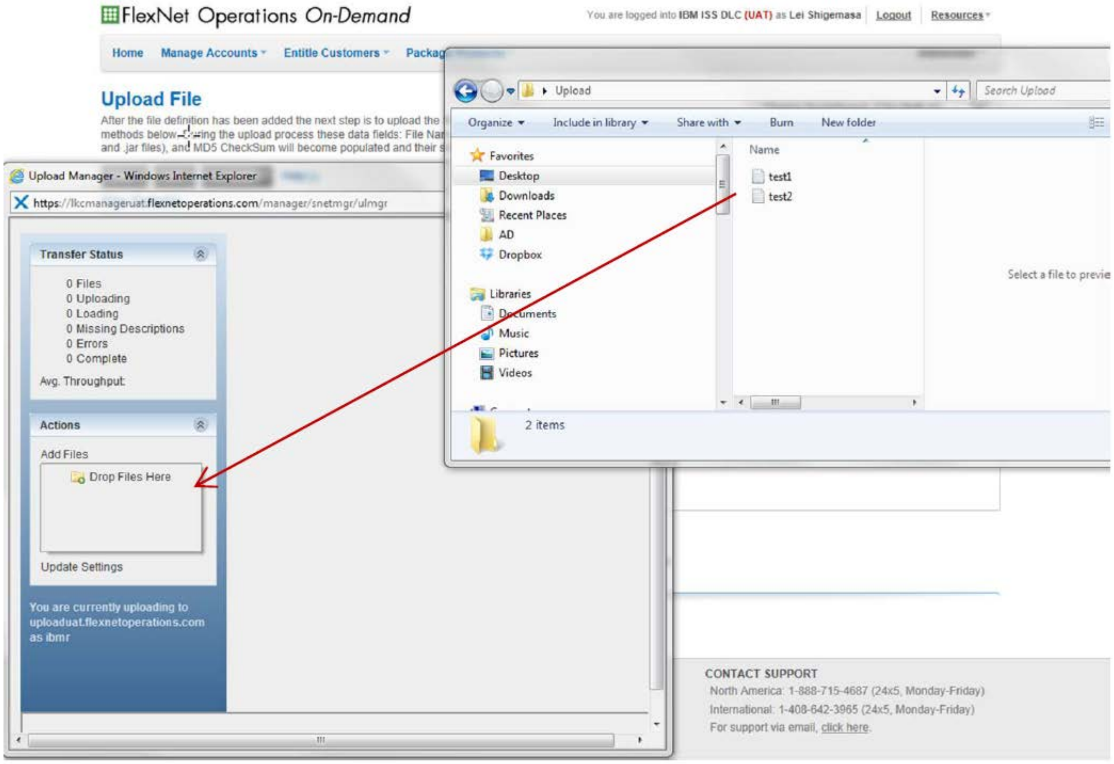


Figure 6-12: Selecting Files Using Upload Manager

The following displays the **File ID** box:

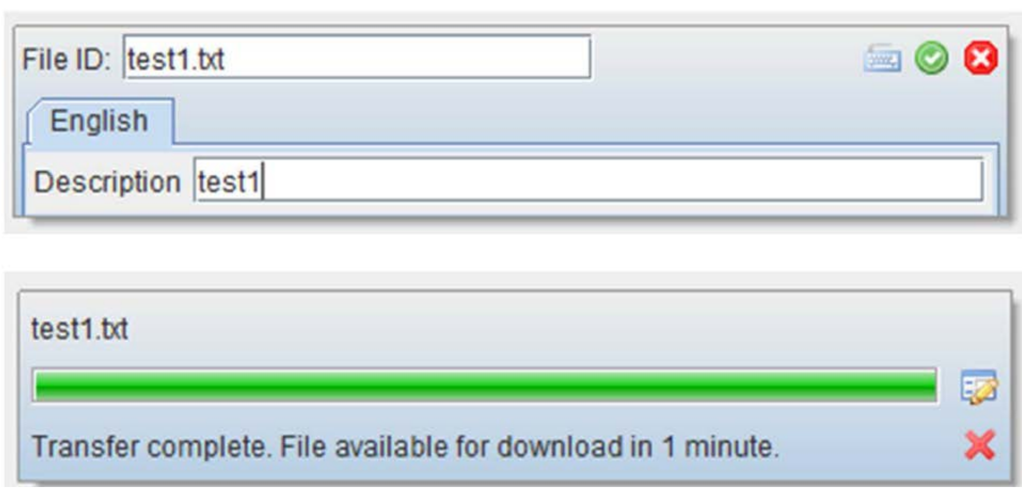


Figure 6-13: File ID Dialog Box of Upload Manager

Converter Template

The Converter Template is located in the **Producer Portal** under **Administer** > **Transactions** > **Converter Templates** > **Package Products Template**. The following displays the **Converter Template** selected and **Load File Image** worksheet selected:

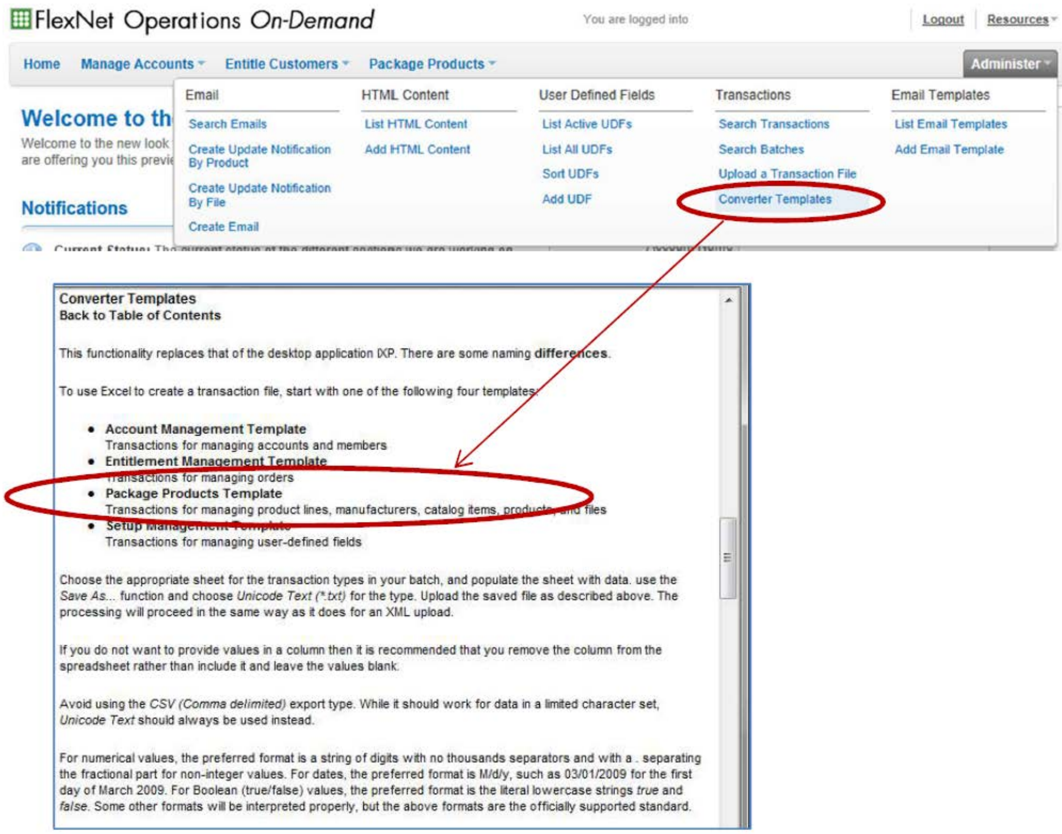


Figure 6-14: Converter Template

The following displays the **Load File Image** worksheet selected:

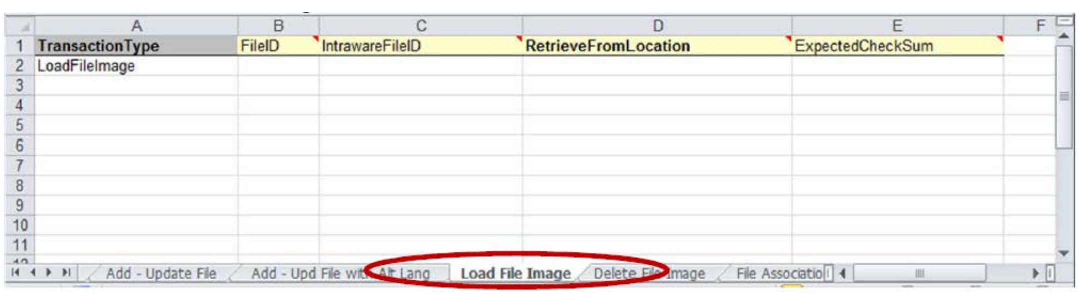


Figure 6-15: Load File Image Worksheet

The Load File Image transaction will allow you to load the file from the Revenera upload server or remote FTP server:

- Include your File ID or IntrawareFileID (System File ID) for reference as the File metadata should already have been added to the application before you load the associated binary.
    - **FileID**—The unique value by which your company identifies individual files. The File ID may come from a release management or source code control system. Cannot be used if `IntrawareFileID` is used.
    - **IntrawareFileID**—The unique value by which Revenera identifies individual files. Cannot be used if `FileID` is used.

- **Retrieve From Location**—This is the relative path to the file on the Revenera FT{ staging server. It should not begin with a forward slash (/) and is a Unix or URL style path (/ separates the directories).
- **ExpectedCheckSum**—The MD5 checksum for the file will always be a 32-digit hexadecimal value. If you calculate this before uploading to the ftp server and also pass it to the Producer Portal using this transaction, the Producer Portal can verify that the file was uploaded to the ftp server correctly.
- **User Defined Fields (UDFs)**—If your implementation includes any File level User Defined Fields (UDFs), these will also appear on the Converter Template when you accessed from the Producer Portal.

Transactions

If the File image is located on Revenera or Remote FTP servers, they can be loaded by submitting XML or WebServices transactions.

The following is sample XML:

```
<?xml version="1.0" encoding="UTF-8"?>
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<SnetTransactionsFile xmlns="http://www.intraware.com/schemas/2002/12/SnetTransactionsFile"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:schemaLocation="http://www.intraware.com/
schemas/2002/12/SnetTransactionsFile http://www.intraware.com/schemas/2002/12/
SnetTransactionsFile.xsd">
<LoadFileImage>
<File>
<FileID/>
<IntrawareFileID/>
</File>
<RetrieveFromLocation/>
<ExpectedCheckSum/>
</LoadFileImage>
</SnetTransactionsFile>
```

Additional information on transaction processing can be found in Entitlements.

***Note** ▪ Please contact your Client Relations Manager, Project Manager or Support if you have any questions.*

7

Transactions

Every time you use FlexNet Operations LLM Producer Portal to make changes to the system, a transaction is created. You can use the **Transactions** section of FlexNet Operations LLM Producer Portal to view these transactions, and in the case of failed transactions to edit and resubmit them.

The **Transactions** section of FlexNet Operations LLM Producer Portal also lets you view and edit transactions which were submitted as XML documents either through the automated XML data feed or by uploading an XML file.

- Search Transactions
- Upload a Transaction File
- Converter Templates
- View Transactions
- Managing Failed Transactions

Search Transactions

In order to view or edit a transaction you must first find the one you want. You do this through the **Search Transactions** page, which is accessed directly from the **Administer** menu of FlexNet Operations LLM Producer Portal.

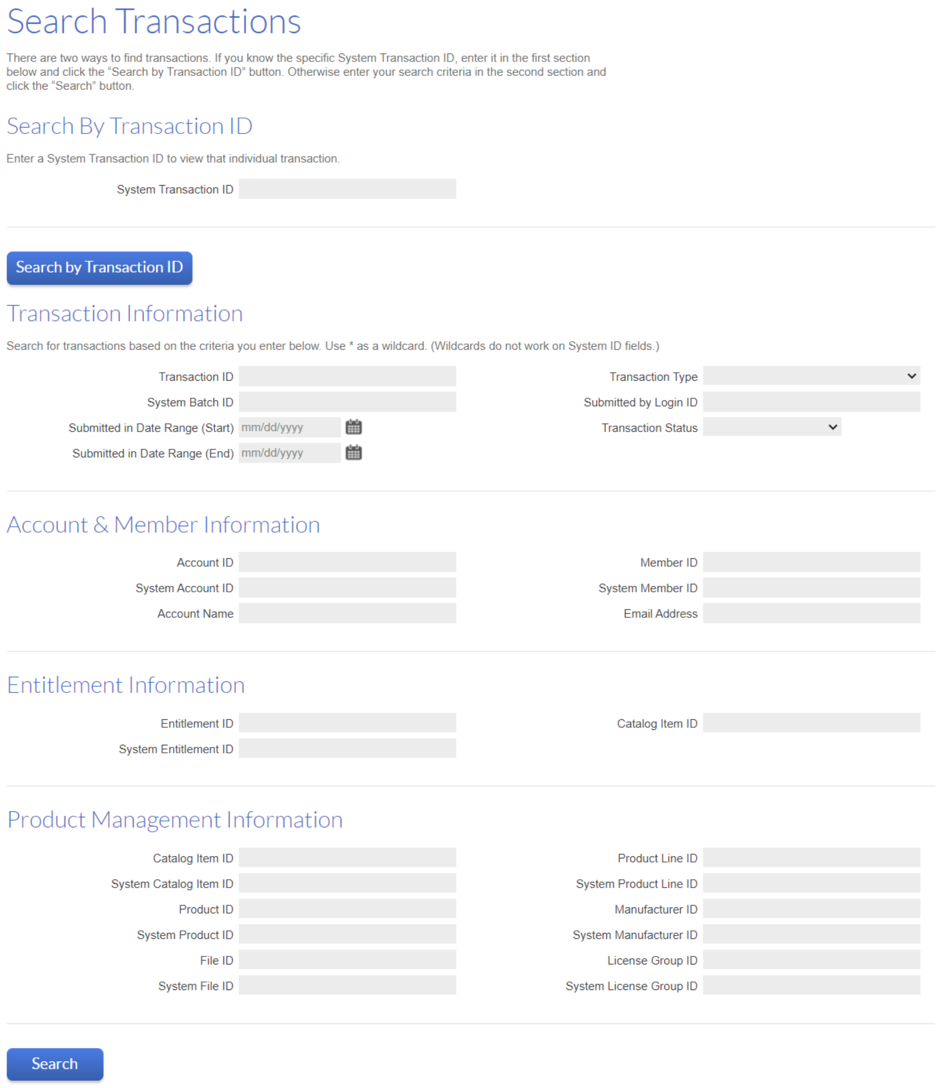


Figure 7-1: Search Transactions Page

There are three ways to identify the transaction you are interested in:

- Enter the System Transaction ID
- Enter the System Batch ID
- Search

Enter the System Transaction ID

A **System Transaction ID** is created for every transaction, whether it is submitted via FlexNet Operations LLM Producer Portal, through the automated data feed, or via an uploaded XML file. If you know the **System Transaction ID**, you can enter it and then click **Search by Transaction ID**, and you can then begin working with the transaction.

Enter the System Batch ID

FlexNet Operations assigns a unique **System Batch ID** to transactions submitted through the automated XML data feed or as part of an uploaded XML file. The **System Batch ID** is applied to all of the transactions within a single XML document.

If you know the **System Batch ID**, you can enter it on the **Search Transactions** page and then click **Search**, and you will be shown a list of all the transactions that made up that batch. You can then drill down to an individual transaction.

Search

You can search for a transaction based on the:

- **Transaction ID** or **System Batch ID**
- **Transaction Type**, such as **Add Member**
- Date that the transaction was submitted, using the **Submitted in Date Range** fields
- Login ID of the user who submitted the transaction, using the **Submitted by Login ID** field
- **Transaction Status**, such as **Successful**, **Failed - Open**, or **Failed - Acknowledged**
- **Account Name** of the account to which the transaction applies
- **Account ID** of the account to which the transaction applies
- **Member ID** referenced within the transaction
- **Email Address**, the email address of a member referenced within the transaction
- **Entitlement ID**, the entitlement or order number within the transaction
- **Product Management** information including **Catalog Item ID**, **System Catalog ID**, **Product ID**, **System Product ID**, **File ID**, **System File ID**, **Product Line ID**, **System Product Line ID**, **Manufacturer ID**, **System Manufacturer ID**, **License Group ID**, and **System License Group ID**.

If your criteria match more than one transaction, you will be shown a list of matching transactions and will be able to select the one you want.

Upload a Transaction File

An alternative method for submitting entitlement and product information is to create a transaction file and upload it to FlexNet Operations LLM Producer Portal. FlexNet Operations LLM Producer Portal allows you to upload a transaction file that conforms to FlexNet Operations' XML schema.

To upload an XML transaction file, click **Upload Transaction File** on the **Administer** menu. The Upload a Transaction File page opens.

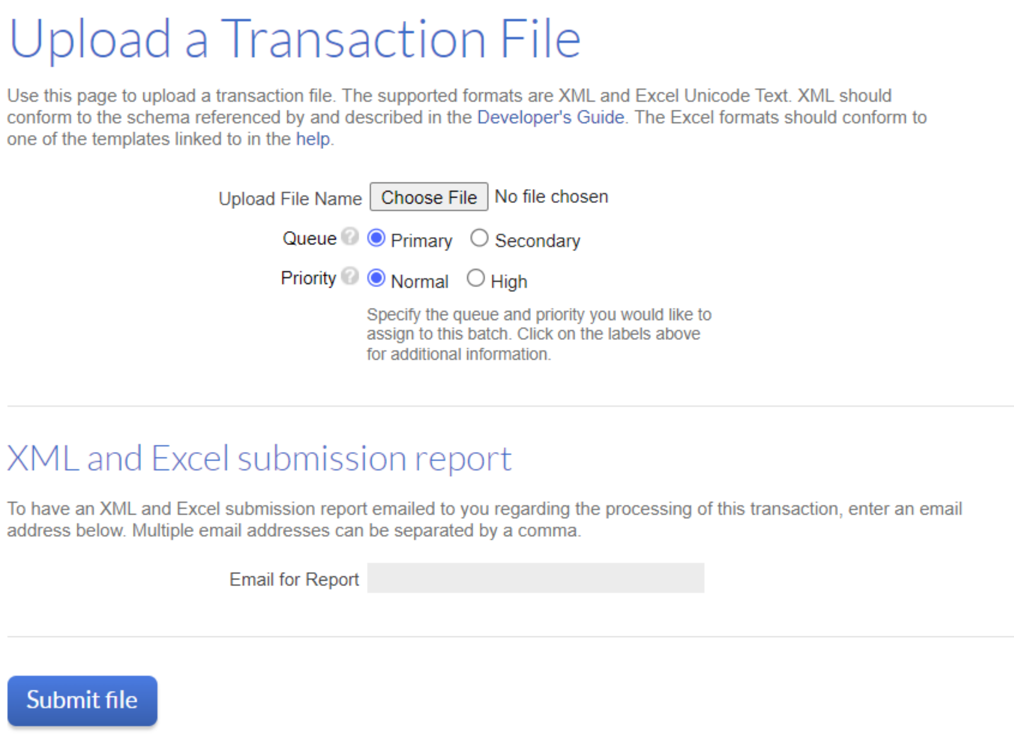


Figure 7-2: Upload a Transaction File Page

To upload a transaction file, perform the following steps:

Task ***To upload a transaction file:***

1. On the **Administer** menu, select **Upload Transaction File**. The **Upload a Transaction File** page opens.
2. Click the **Choose File** button to open a system window which will let you choose the file using the file manager.
3. To have a copy of the submission report for this entitlement—indicating the success or failure of each transaction in the file—emailed to you or to other people, enter one or more email addresses in the **Email for Report** field.
4. Click **Submit file**. FlexNet Operations LLM Producer Portal will upload the file through your browser and will immediately begin processing the transactions within the file. Each transaction will be given a unique **System Transaction ID**. The file submission will be given a unique **System Batch ID**.

For specifics on the XML document, see *FlexNet Operations Transaction Processing Specification*.

Converter Templates

To use Excel to create a transaction file, FlexNet Operations LLM Producer Portal provides the following four templates:

Table 7-1 ▪ Converter Templates

Name	Description
Account Management Template	Transactions for managing accounts and members.
Entitlement Management Template	Transactions for managing Entitlements.
Package Products Template	Transactions for managing product lines, manufacturer, catalog items, products, and files.
Device Management Template	Transactions for managing FlexNet Embedded integration.
Setup Management Template	Transactions for managing user-defined fields.

To use a converter template, perform the following steps.

Task ***To select a converter template:***

1. On the **Administer** menu, select **Converter Templates**. A popup opens providing links to the following four Microsoft Excel templates:
    - **Account Management Template**
    - **Entitlement Management Template**
    - **Package Products Template**
    - **Device Management Template**
    - **Setup Management Template**
2. Click on the appropriate Excel spreadsheet for the transaction types in your batch to download the template.
3. In Microsoft Excel, open the Excel spreadsheet and populate it with data.

    Note ▪ *If you do not want to provide values in a column, then it is recommended that you remove the column from the spreadsheet rather than include it and leave the values blank.*
4. Select **File > Save As** and choose **Unicode Text (*.txt)** for the file type.

    Important ▪ *Avoid using the* ***CSV (Comma delimited)*** *export type. While it should work for data in a limited character set,* ***Unicode Text*** *should always be used instead.*

5. Upload the saved file as described above. The processing will proceed in the same way as it does for an XML upload.

Entering Data

When entering data in the Excel spreadsheet, note the following:

- **Numerical values**—For numerical values, the preferred format is a string of digits with no thousands separators and with a period (.) separating the fractional part for non-integer values.
- **Dates**—For dates, the preferred format is MM/DD/YYYY, such as 03/01/2024 for the first day of March 2024.
- **Boolean values**—For Boolean (true/false) values, the preferred format is the literal lowercase strings **true** and **false**. Some other formats will be interpreted properly, but the above formats are the officially supported standard.
- **Update and AddUpdate**—**Update** and **AddUpdate** transactions may be blank data. If you upload a file containing transactions of these types, then any columns you include will be assumed to contain the desired value.
    - In particular, if a column contains all empty values, then the records will still be updated, and their values corresponding to that column will all be blanked.
    - If you wish to update only a select subset of fields, then make sure to delete the columns for attributes you do not want to update from the sheet.

Multiple-Valued Attributes

Multiple-valued attributes exist for many transaction types. The most available example is that you might want to have several line items on a single **AddOrder** transaction. This is not well-adapted to spreadsheets; it is essentially "expanding upon a row."

This problem is handled by putting as many rows as necessary in the spreadsheet, repeating any data that is single-valued and the same for all rows. Some subset of that data (which varies by transaction type) is used to identify when rows really belong to the same transaction.

Data that is only needed once for the transaction type is taken from the first row, and data that can have multiple values is taken from the aggregation of the values given in all rows for that transaction. Consider the following example:

Table 7-2 ▪ Example of Multiple-Valued Attributes

Transaction Type	OrderID	SKU	UDF[ORD|INVOICE-NOTES]
AddOrder	123	DBCLIENT	Invoices can have notes
AddOrder	123	DBSERVER	Even more than one note

This example puts two SKUs on the same **AddOrder** transaction. It also sets two values of a multiple-valued **UDF INVOICE-NOTES** for the entitlement.

This example also illustrates that the repeated rows can be used to collect multiple aggregated values simultaneously.

***Note** ▪ There is no need to repeat each of the multiple UDF values for each of the multiple SKUs.*

Of course, a real upload would probably have more columns.

***Important** ▪ It is imperative to always repeat the transaction type and a certain undocumented collection of IDs and is best to repeat every single-valued field (since which are essential is undocumented).*

User-Defined Fields

User-defined fields are supported by this type of batch upload. The templates described above will include the user-defined fields you have configured.

You will notice that user-defined fields appear in columns whose names follow the convention **UDF[level|code]**, where:

- **level** is the UDF level code as defined in the XML schema.
- **code** is the UDF ID visible on the **List All UDFs** page.
- The character between the **level** and the **code** is a pipe character.

***Important** ▪ It is important not to change these column names. If they are changed, the transactions will be processed anyway, but values in the column whose name has been changed will not get assigned to the corresponding UDF.*

Creating a Delimited Text File By Means Other Than Excel Export

If you are creating a delimited text file by means other than an Excel export, then be aware of the details of the two supported formats:

Excel Unicode Text

- Fields are delimited by tabs and optionally enclosed by double quotes.
- Literal double quotes within fields are escaped by doubling, not by backslashes.
- The character encoding is UTF-16 little endian, and the file must begin with the byte order marker; this is how FlexNet Operations LLM Producer Portal will detect the tab-delimited format.

Excel CSV

- Fields are delimited by commas and optionally enclosed by double quotes.
- Literal double quotes within fields are escaped by doubling, not by backslashes.
- The character encoding is UTF-8, and the file does not begin with a byte order marker. This is not meant to suggest that the CSV export type in Excel will use UTF-8; it will not. It will export many non-ASCII characters as question marks. This format is only documented for the benefit of those using something other than Excel, for which UTF-8 CSV may work well.

XML Transaction Files Are Preferred

While this processing of delimited text files can be convenient, XML transaction files are less error-prone. Highly automated solutions should be developed around XML rather than delimited text whenever possible.

View Transactions

When you select a transaction using the **Search Transactions** page—whether you select it directly using the **Transaction ID** or pick it from a list generated by a search—the transaction details are displayed on the **View Transaction** page.

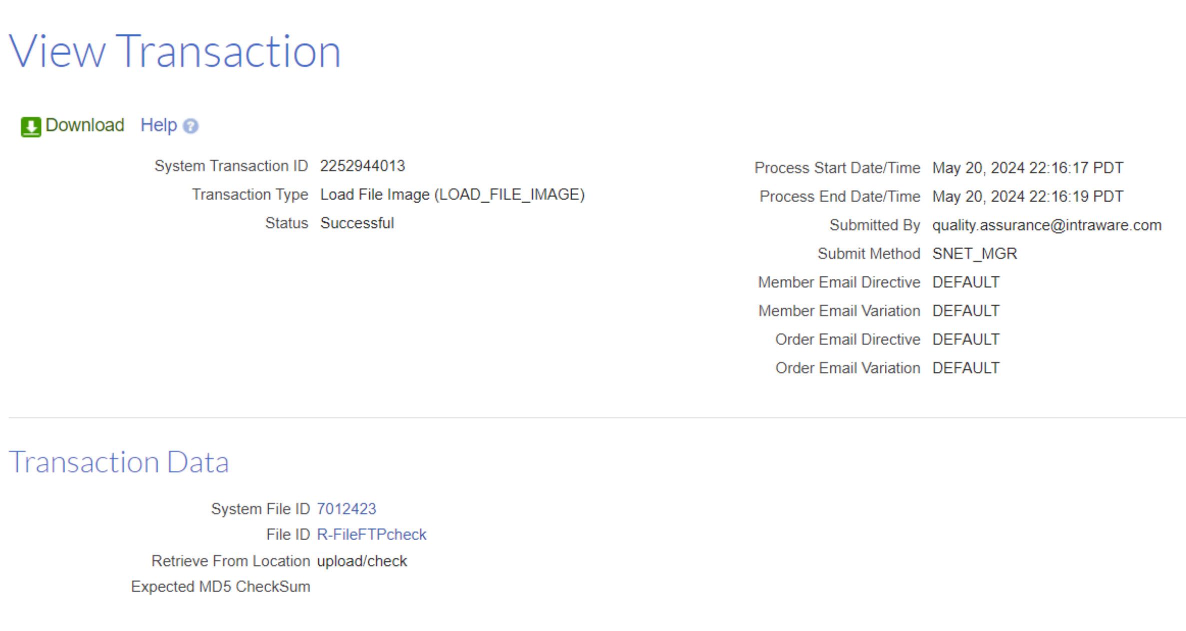


Figure 7-3: View Transaction Page

The **View Transaction** page always displays header information including the **Transaction ID**, **Transaction Type**, and **Status**. It also includes:

- **Process Start Date/Time** and **Process End Date/Time**—Submission date and time.
- **Submitted By**—Who submitted the transaction.
- **Submit Method**—What method was used to submit the transaction.

The details of the transaction data are displayed, the specifics of which are determined by the **Transaction Type**.

Managing Failed Transactions

If the transaction failed, then the errors are listed and you are given the option to:

- **Edit and Resubmit**—If you can, and want to, resolve the issue(s) which caused the errors(s) you can click on **Edit and Resubmit**. The failed transaction will be displayed in the **Edit Transaction** form and you can edit the fields which caused the error.

- **Acknowledge**—If you don't want to try and fix the transaction you can acknowledge it as a failed transaction by clicking the **Acknowledge failed transactions** link on the **Search Results: Transactions** page. This makes it easier to keep track of the transactions you do want to fix.

  If you change your mind later you can select the transaction and open it on the **View Transaction** page, where you can click the **Undo Acknowledgment** link.

- **Force**—Your site may be configured to allow you to “force” certain kinds of transaction failures. “Forceable” transactions are ones which have violated some business rule that your company set up but are acceptable to the FlexNet Operations LLM Producer Portal service.

8

FlexNet Publisher Licensing

This chapter provides more insight about licensing via the following sections:

- FlexNet Operations LLM Quick Start for FlexNet Publisher Certificate Style Licensing
- Licensing Best Practices

FlexNet Operations LLM Quick Start for FlexNet Publisher Certificate Style Licensing

Before starting certificate style licensing, user make sure to have access to Producer Portal UAT, lmcrypt set up, and at least one license template must be set up by the Revenera Account Manager in consultation with product team.

- Use Case Scenarios
- Use Cases
- Considerations

Use Case Scenarios

The following displays the Illustrative scenario:

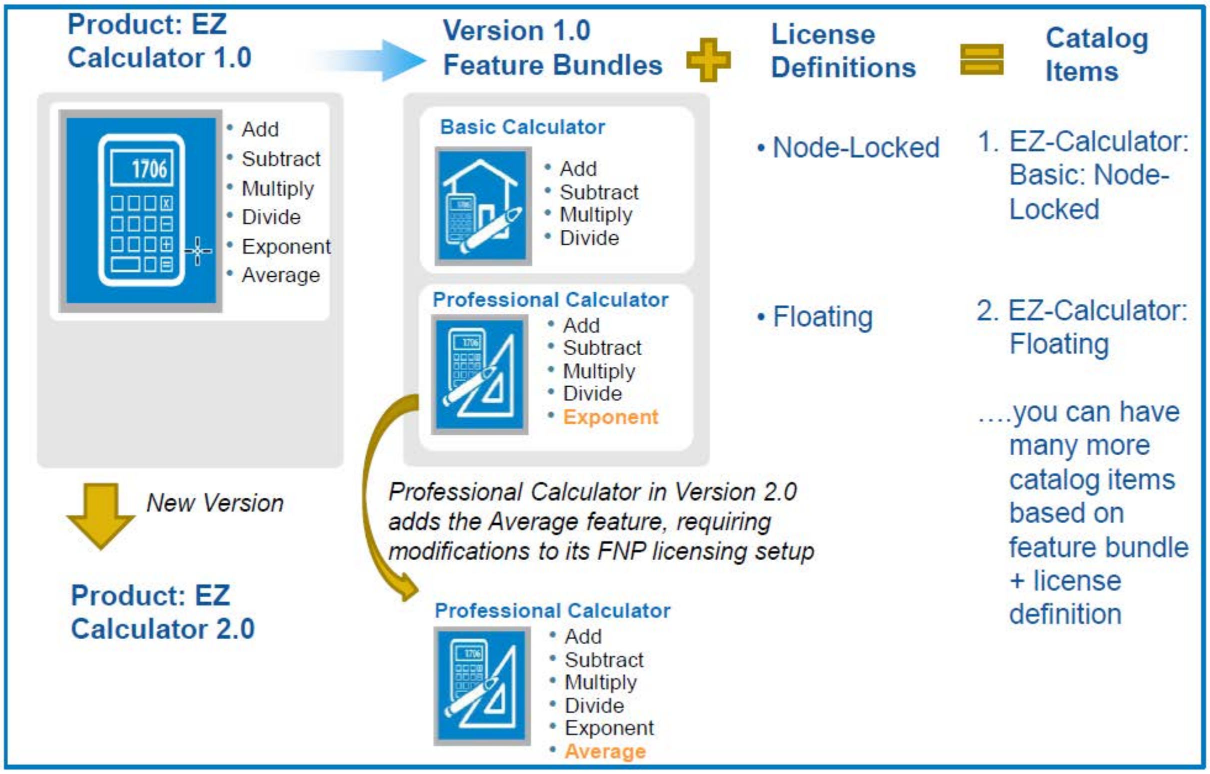


Figure 8-1: FlexNet Publisher Certificate Style Licensing Scenario

Scenario Assumptions

The following assumptions are made in this scenario:

- Customers that are current on maintenance will get EZ- Calculator 2.0 with features corresponding to the catalog item that they currently own (ie EZ-Calculator Basic or EZ-Calculator Professional). Catalog items are essentially subscription products.
- Licensed features inside a product binary are evolved in a manner that is backwards compatible. So, a license file created for v2.0 will also work for a v1.0 product binary. This is a pre-requisite for subscription products and is enabled nicely by FlexNet Publisher.

Use Cases

The following are the use case based scenarios that are demonstrated in this section:

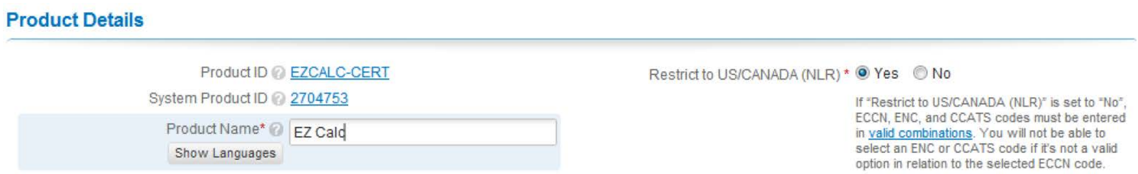
- Initial Set Up of EZCalculator-Basic: Nodelocked Catalog Item
- Initial Set Up of EZCalculator-Professional: Floating Catalog Item
- EZ-Calculator 2.0 is Released - Upgrade Set Up of EZCalculator-Basic: Nodelocked Catalog Item
- EZ-Calculator 2.0 is Released - Upgrade Set Up of EZCalculator-Professional: Floating Catalog Item

Initial Set Up of EZCalculator-Basic: Nodelocked Catalog Item

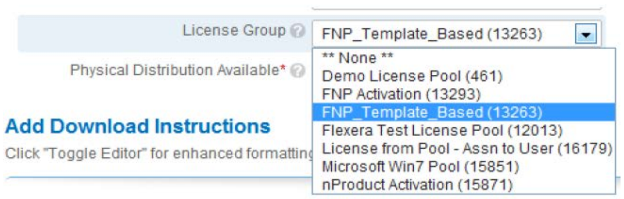
User configures the EZCalculator-Basic: Nodelocked catalog item. The following describes the procedure to configure:

Task ***To set up the EZCalculator-Basic: Nodelocked catalog item:***

1. Create the product. In this example, the product version is set to 1.0. The following displays the product creation:



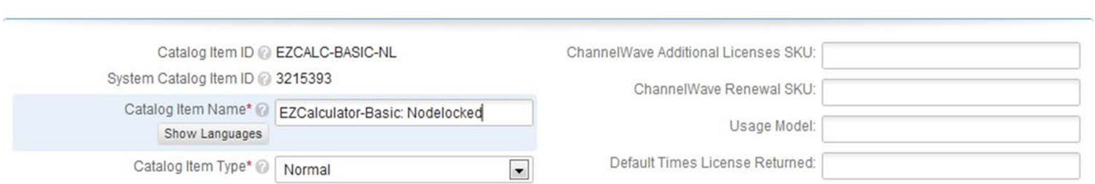
2. Remember to assign a license group to the product. The following displays the License Group selection:



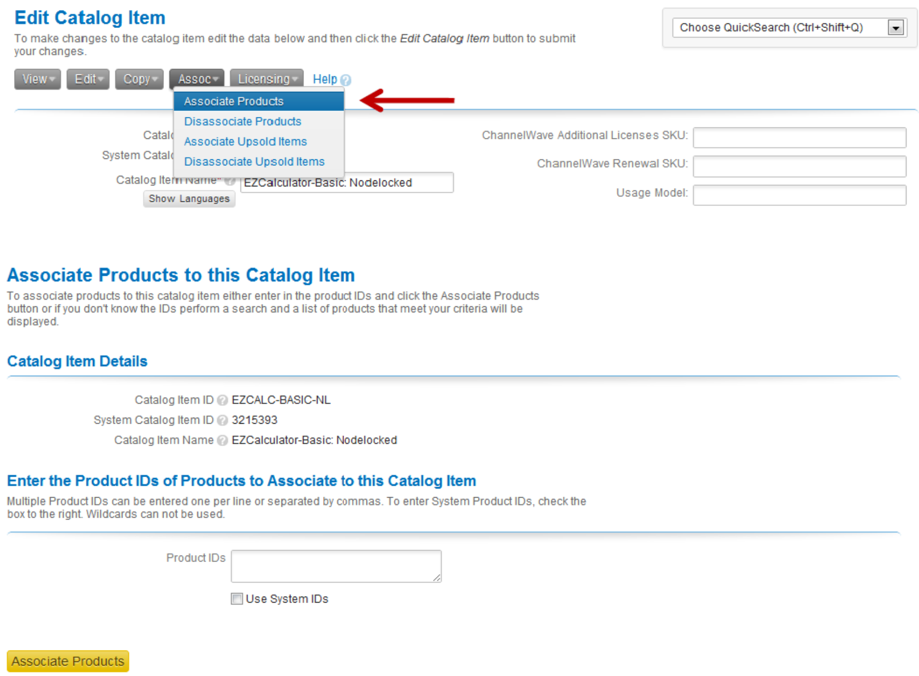
***Note* ▪ Consider the following information:**

- *License Groups pertain to the licensing technology used in your product.*
- ***FNP_Template_Based** refers to FlexNet Publisher.*

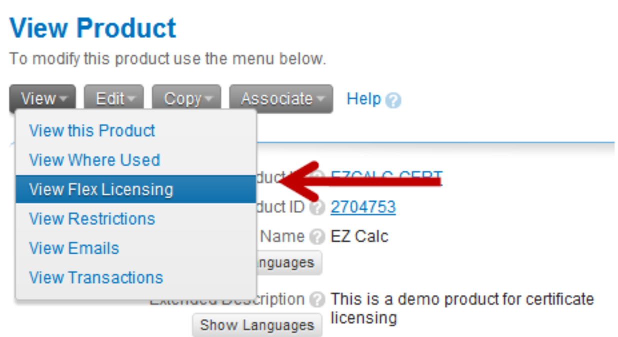
3. Create the catalog item. The following displays the catalog item creation:



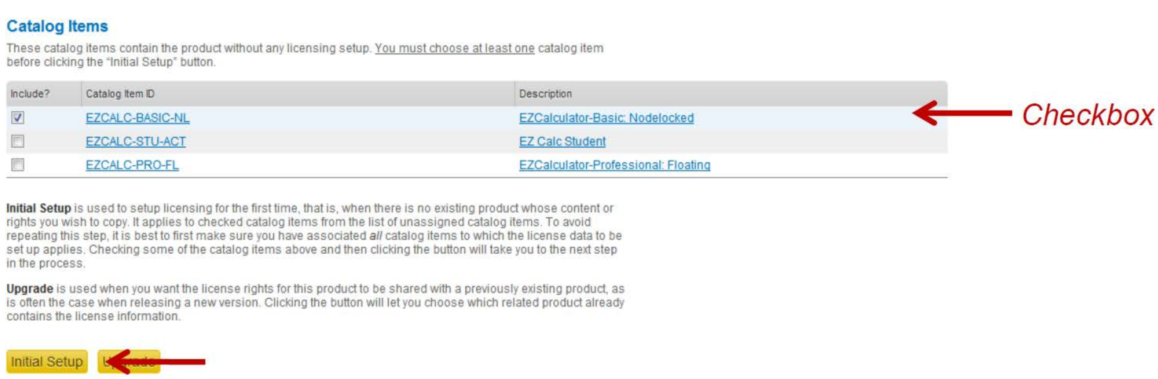
4. Associate catalog item with product. The following displays the product association to catalog item:



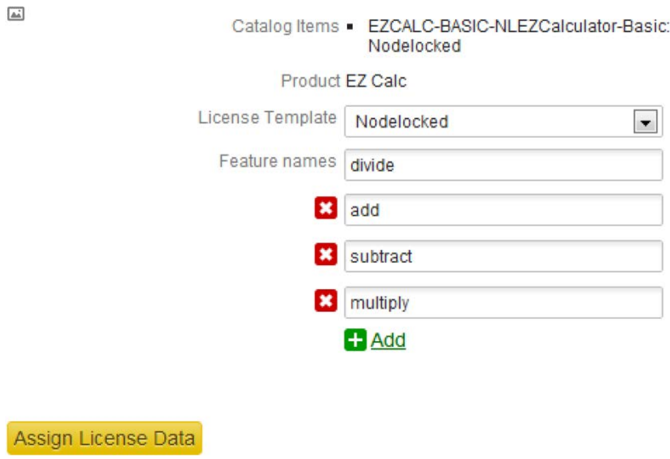
5. Now you are ready to set up FlexNet Publisher licensing for the product. Before configuring license for a product, it must be first associated with a Catalog Item. The following displays the **View Flex Licensing** option selection in the **View Product** page:



6. Check the catalog item EZCalculator-Basic: Nodelocked and click on the **Initial setup** button. The following displays the **EZCALC-BASIC-NL** catalog item selection in the **Catalog Items** page:



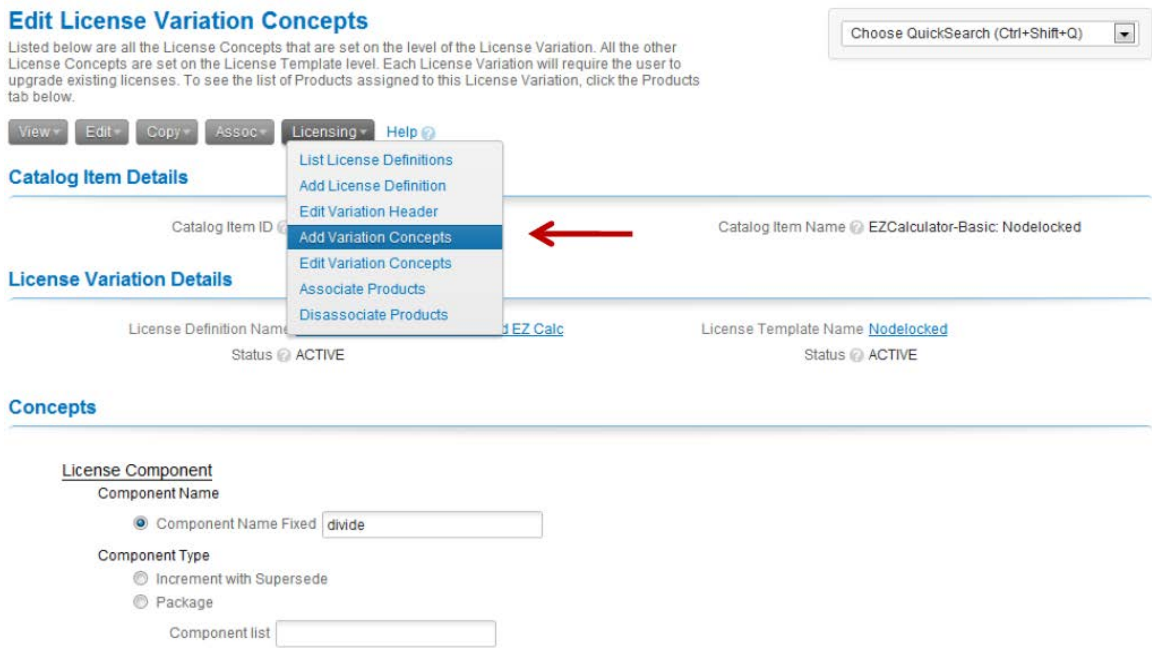
7. Assign a license template to the product and start adding features. To add/remove features click on “- +”. When done click on the **Assign License Data** button. The following shows the license template along with features addition:



__Note__ ▪ License templates are set up by the Revenera account team.

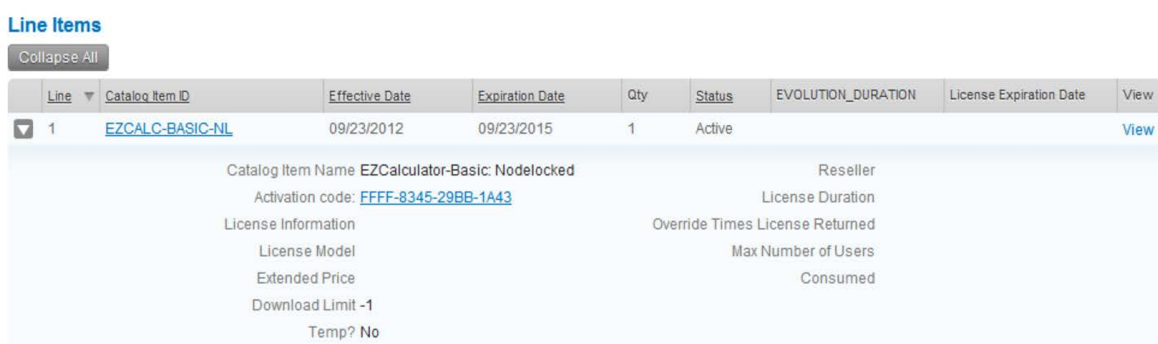
8. The set up is now complete. In advanced use cases, you may want to click on the **Details** link to set up feature-specific overrides for your license model. For example, some ISVs might want to set a vendor string on each feature line of a FlexNet Publisher license. The following displays the **License Details** page:

9. For each Component/Feature you can indicate the type (package, increment, feature), and version (single feature shown). A vendor string can also be defined. The following shows the **Add Variation Concepts** option selection from the **Licensing** tab as well as the license component’s name and type:

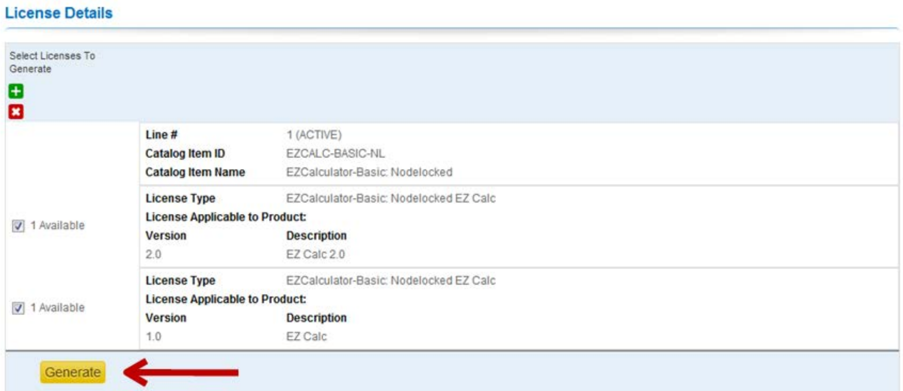


***Note** ▪ This is an optional step in this procedure.*

10. Create an entitlement line item for this catalog item. The following displays the **Line Items** page:



11. Click **View** > **View License** to launch the license fulfillment workflow. The following indicates the **Generate** button to generate the configured license:

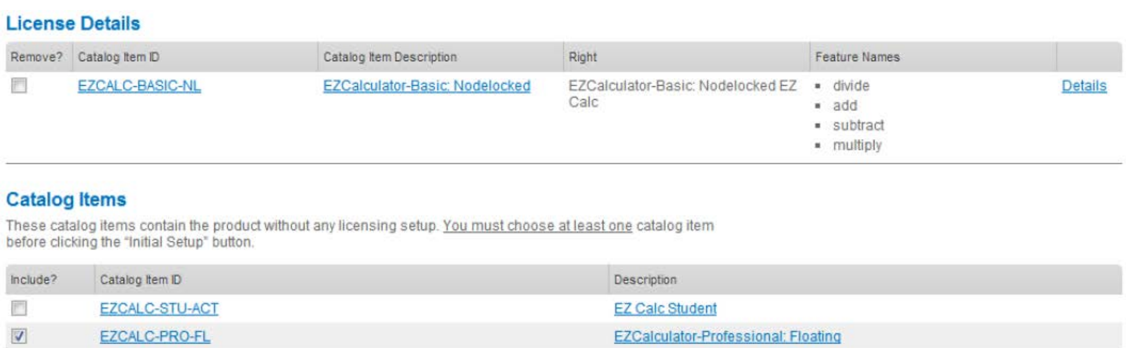


Initial Set Up of EZCalculator-Professional: Floating Catalog Item

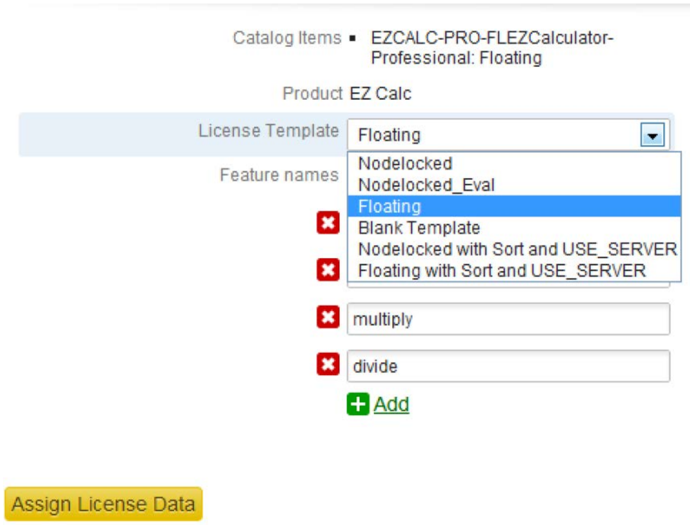
User configures the EZCalculator-Professional: Floating catalog item. The following describes the procedure to configure:

Task ***To set up the EZCalculator-Professional: Floating catalog item:***

1. Create the product.
2. Remember to assign a license group to the product.
3. Create the catalog item.
4. Associate catalog item with product.
5. Check the catalog item **EZCalculator-Professional: Floating** and click on the **Initial Setup** button.The following displays the **EZCALC-PRO-FL** catalog item selection under the **Catalog Items** list:

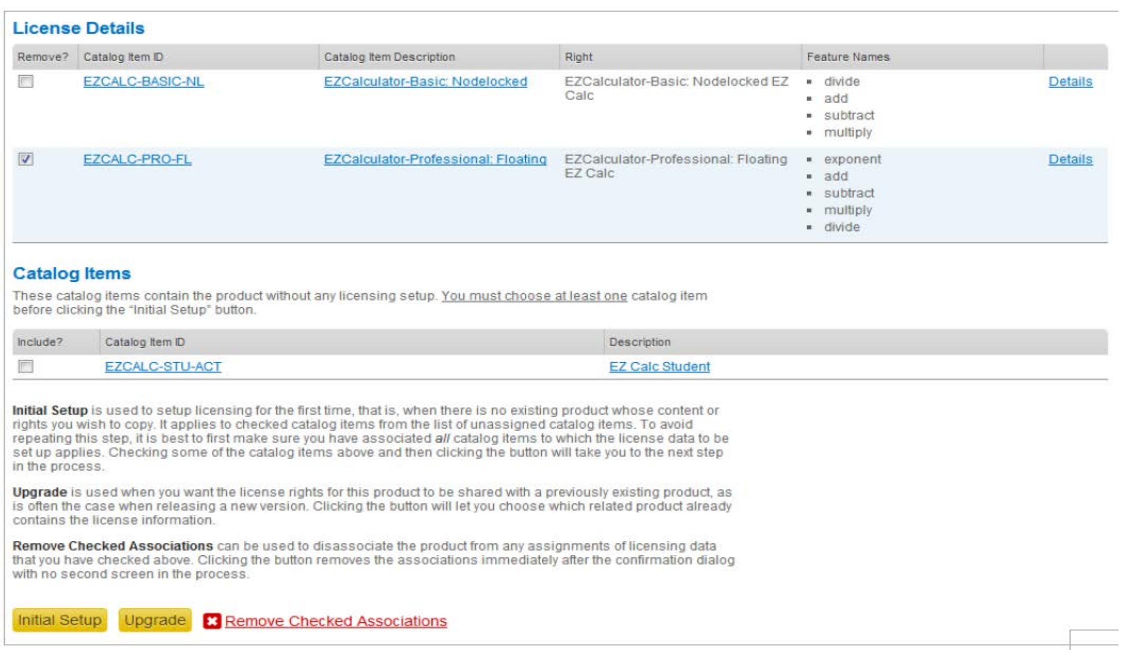


6. Assign a license template to the product and start adding features. To add/remove features click on "- +". When done click on the **Assign license data**. The following shows a license template selection with a feature addition:



Note ▪ *License templates are set up by the Revenera account team.*

7. The set up is now complete. Here, following shows that two catalog items are associated with this product release:

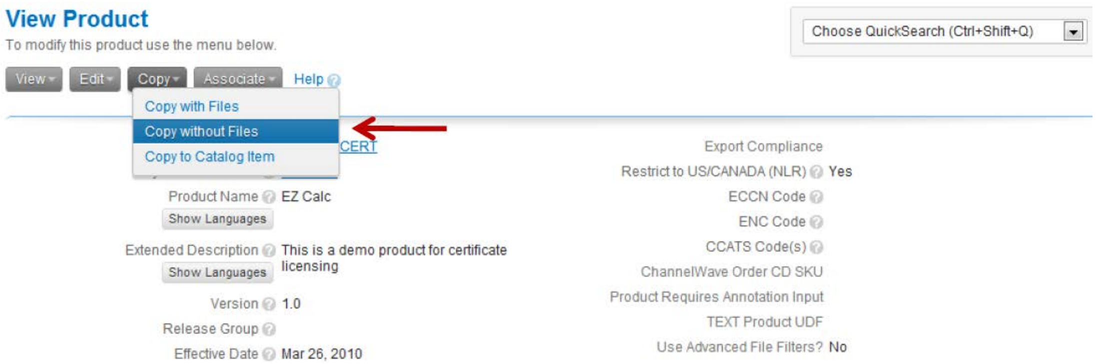


EZ-Calculator 2.0 is Released - Upgrade Set Up of EZCalculator-Basic: Nodelocked Catalog Item

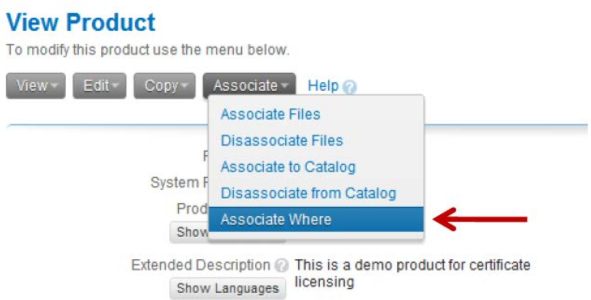
User upgrades the configured EZCalculator-Basic: Nodelocked catalog item. The following describes the procedure to upgrade:

Task ***To upgrade the EZCalculator-Basic: Nodelocked catalog item:***

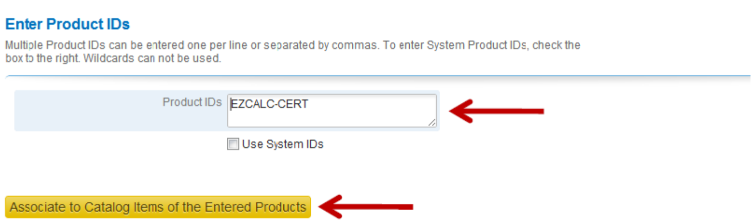
1. Create the new product release 2.0 by copying product release 1.0. The following displays the new product creation:



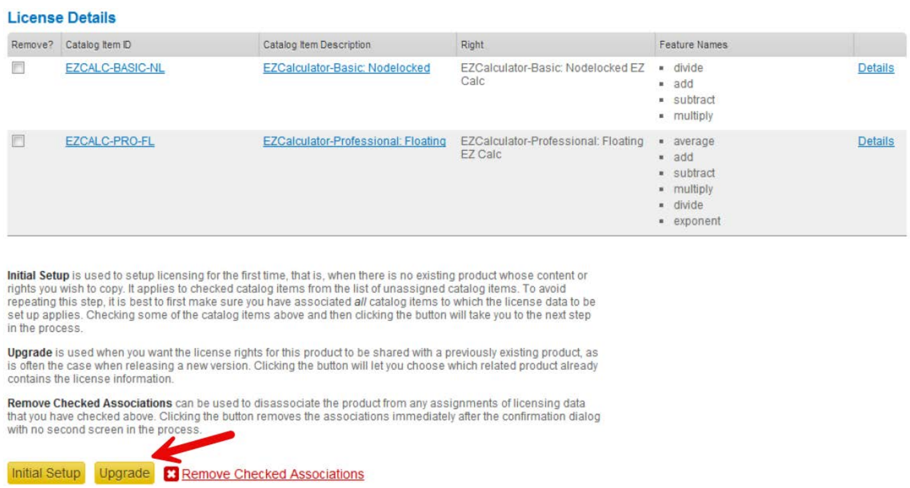
2. Associate the new product release to the existing catalog item EZ-Calculator Basic: Node Locked. The following displays the **Associate Where** option selection in the **View Product** page:



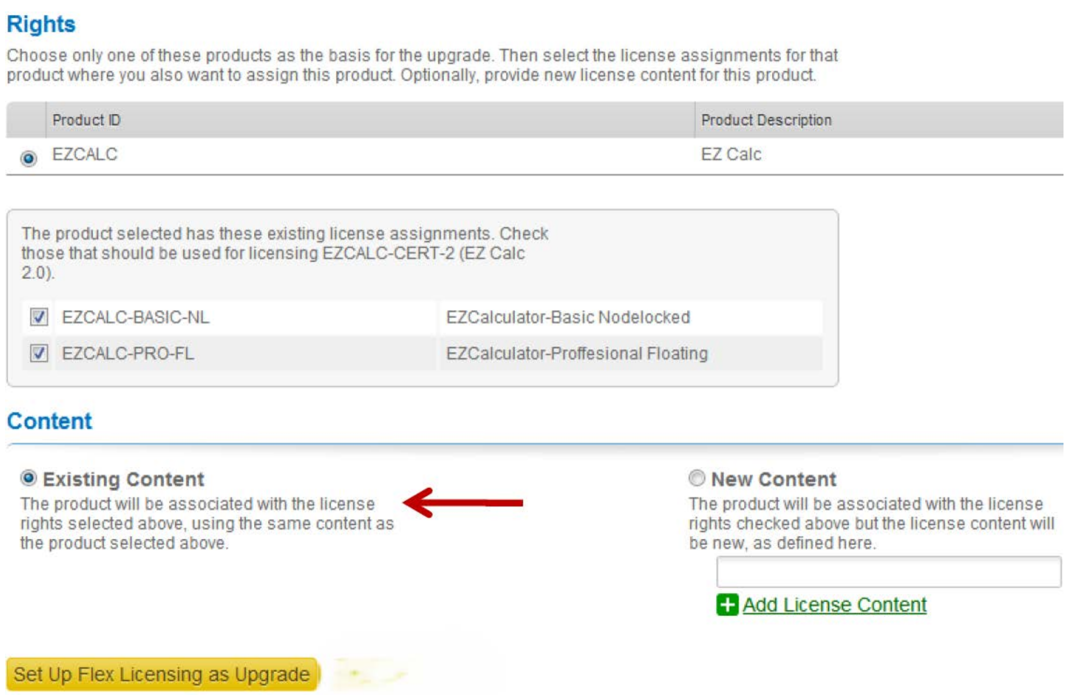
3. Enter the product ID for version 1.0 and click on the **Associate to Catalog Items of the Entered Products** button. The following displays the **Enter Product IDs** page :



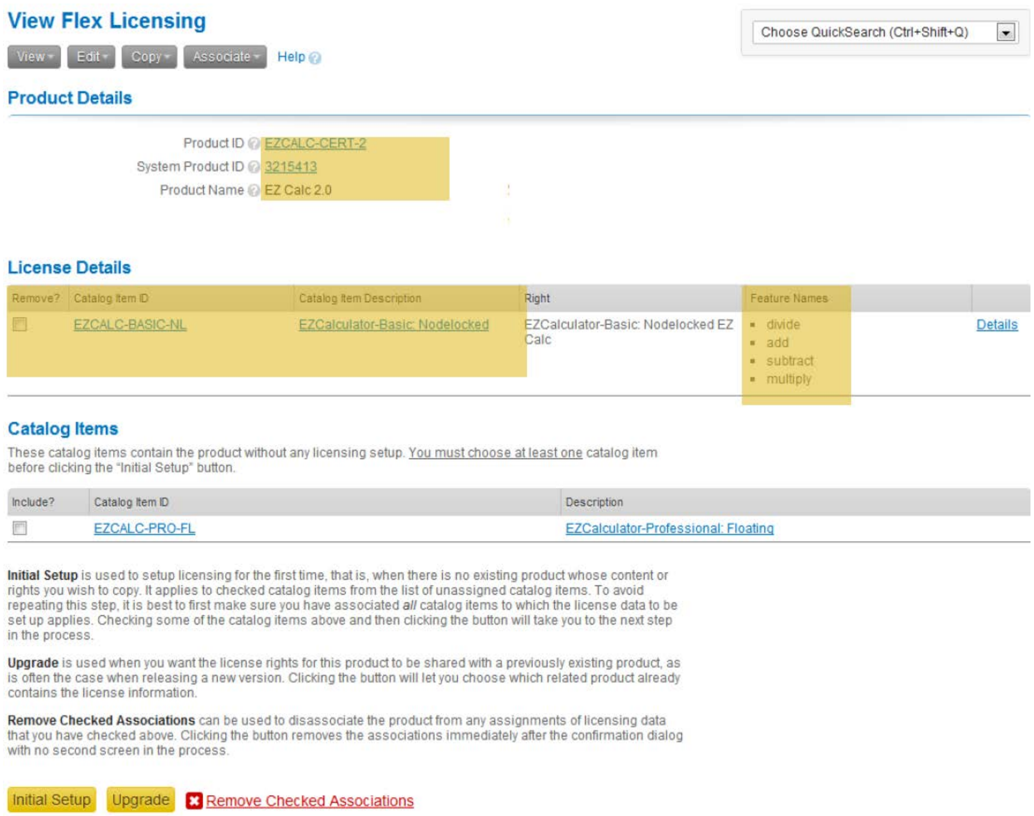
4. View Flex Licensing for this product release and click on the **Upgrade** button. The following shows the **License Details** page:



5. Check EZ-Calculator Basic: Node Locked and select Existing Content since there are no new features for this catalog item. Click on the **Set up Flex Licensing as upgrade** button. The following displays the **Existing Content** option selection:



6. Verify that the upgrade licensing has been set up for this association. This completes the upgrade set up as shown below:

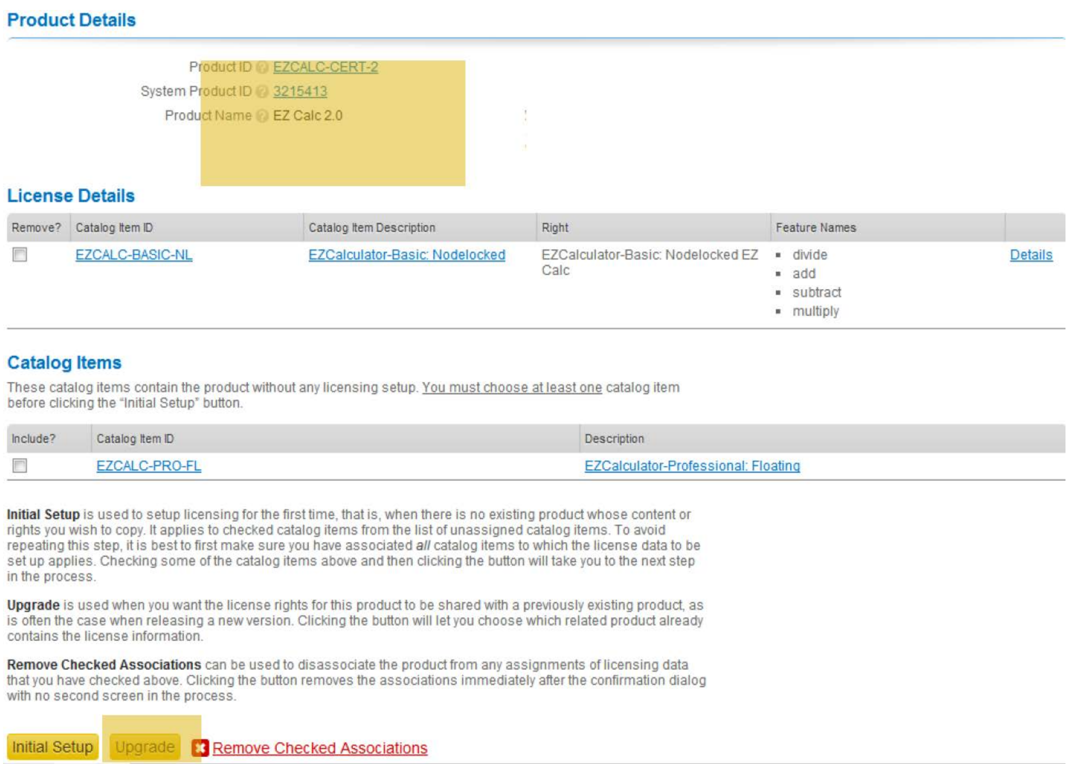


EZ-Calculator 2.0 is Released - Upgrade Set Up of EZCalculator-Professional: Floating Catalog Item

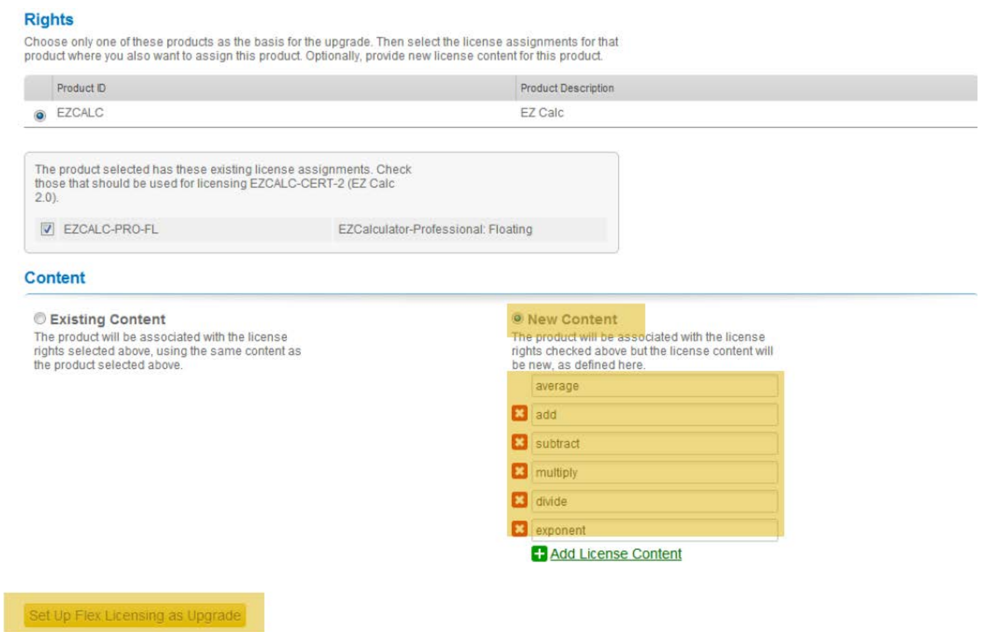
User upgrades the configured EZCalculator-Professional: Floating catalog item. The following describes the procedure to upgrade:

Task ***To upgrade the*** **EZCalculator-Professional: Floating catalog item:**

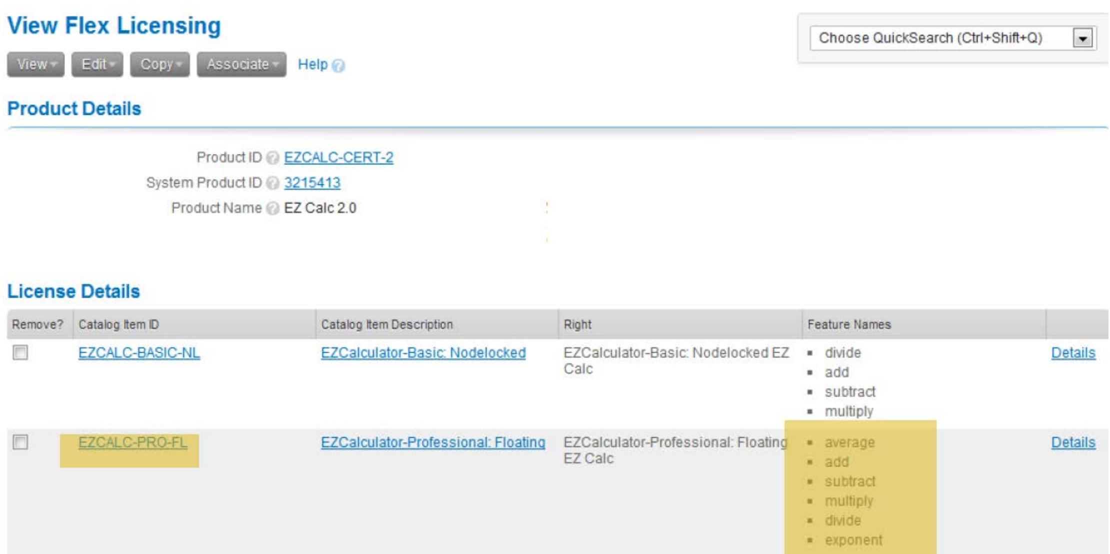
1. This catalog now includes a new feature called “average”. The catalog item is already associate with EZ-Calculator 2.0. View Flex Licensing to get to the screen below. Click on the **Upgrade** button. The following displays the Product details, license details, and catalog Item:



2. Check the **New Content** option and list out the features in this catalog item. Click on the **Set up Flex Licensing as upgrade** button to complete set up. The following indicates the **New Content** lists and **Set up Flex Licensing as upgrade** button:



3. Verify the completed set up shown below:



Considerations

For upgrade products, any new entitlements and fulfillments created will reference the latest feature content for the associated catalog items as described in this chapter. This is consistent with a subscription business model.

If your business model does not involve subscriptions, create new catalog items for each product release, and follow the steps for **Initial Set Up** as explained in Initial Set Up of EZCalculator-Basic: Nodelocked Catalog Item.

Licensing Best Practices

The Revenera FlexNet Operations LLM service offers manufacturers ease of management and functionality to deliver, track, and report license keys. This document:

- Describes basic FlexNet Operations LLM functionality available to issue licenses to end users.
- Recommends some best practices to administer license keys using FlexNet Operations LLM.
- Provides considerations on how to approach customized license generation using FlexNet Operations LLM.

Licensing best practices are described in the following sections:

- FlexNet Operations LLM License Styles, Order-Based
- License Generators for Order-Based License Keys
- FlexNet Operations LLM License Styles – End User Based
- Token-Based Licensing
- Getting Started
- Electronic Licensing Summary
- Summary

FlexNet Operations LLM License Styles, Order-Based

In a standard FlexNet Operations LLM license implementation; there are following three different methods to send a License Key in the Order transaction to FlexNet Operations LLM.

- Entitlement Line Item License Code (Level Catalog Item) Style
- Entitlement License Pool (Level Catalog Item) Style
- Binary License File Style

Entitlement Line Item License Code (Level Catalog Item) Style

In this method, the plain text License Key is sent by order line in an Order transaction to FlexNet Operations LLM (single or multiple plain text License Keys may be sent, as long as the data is sent in one field). If you need additional information on this feature, please contact your Account Manager/Project Manager.

Table 8-1 ▪ Entitlement Line Item License Code (Level Catalog Item) Style

<table>
<tr><th>Process</th><th>FlexNet Operations LLM Producer Portal</th><th>XML Transaction or IXP Processor</th><th>End User Portal</th></tr>
<tr><td>Setup</td><td>1. Product Management
2. Configure
3. Add License Group
Create License Group and use the attribute for the License Style field, Entitlement Line Item License Code (Level Catalog Item).
4. Add / Edit Catalog Item and select the correlating License Group from the License Group Field.</td><td>Refer to IXP documentation:
1. Product Management template
2. Add-Update License Groups transaction.
3. Add-Update Catalog Item transaction.
Populate the Intraware License Group ID to the Catalog Item set up for the field header Intraware License Group ID.</td><td>N/A</td></tr>
<tr><td>Delivery</td><td>Create Entitlement for an Account:
1. From the View Account display, select Entitle > Entitle Account.
2. Populate relevant fields to complete order submission, and enter License Key text to the field, License Code.
3. Submit form by clicking Entitle Account.</td><td>Refer to IXP documentation:
1. Entitlement Management Template
2. Populate the License Key text in the field, LicenseCode, to one of these transaction templates appropriate for your process:
• Add Order
• Edit Order
• Process Order</td><td>During the Order transaction, the system by default will send the End User specified on the Order an Order Email.
The Order Email template can be set up to contain a merge tag to display the License Key text in the customized email to the end user.</td></tr>
</table>

Table 8-1 ▪ Entitlement Line Item License Code (Level Catalog Item) Style

Process	FlexNet Operations LLM Producer Portal	XML Transaction or IXP Processor	End User Portal
Tracking/ Reporting	Options: 1. Send a real-time copy of the Order Email by using the option to **Copy as BCC** on the Entitle Account form. 2. View order history from the View Account display: **View > View Entitlements**. 3. Send a transaction record via email by using the **Email for Report** option on the Entitle Account form.	Options: 1. Send a real-time copy of the Order Email by using the field **NotificationBCC** on one of these transaction templates appropriate for your process: • Add Order • Edit Order • Process OrdeR 2. Specify the email address to send transaction record by using the **Email for Report** option on the Upload a Transaction File function in FlexNet Operations LLM Producer Portal (IXP method). 3. Refer to the XML schema, located in the FlexNet Operations LLM Release Notes, for Setup, Delivery, and to specify a transaction record if using a Datafeed Client to submit XML transactions to FlexNet Operations LLM.	Once the Order transaction is successfully processed by FlexNet Operations LLM, the License Key is assessable from the “License Key” link on the Download page, Order History page, or Index page, depending on your implementation.
	FlexNet Operations LLM Reporter: Create an Entitlement Report to obtain tracking of license keys by Account.		

Entitlement License Pool (Level Catalog Item) Style

In this method, pools of plain text License Keys are set up in advance to FlexNet Operations LLM Producer Portal. FlexNet Operations LLM Producer Portal automatically pulls a License Key from the pool during an order processing transaction. This License Group Style is unavailable by default, if you would like to enable License Pools Support, please contact your Account Manager/Project Manager.

Table 8-2 ▪ Entitlement License Pool (Level Catalog Item) Style

Process	FlexNet Operations LLM Producer Portal	XML Transaction or IXP Processor	End User Portal
Setup	Setting up the license pool: **1.** Product Management **2.** Configure **3.** Add License Group **4.** Create License Group and use the attribute for the License Style field, **Entitlement License Pool (Level Catalog Item)**. **5.** Use IXP Product Management template, Add Licenses to Pool transaction (to initially add license keys or to refill license keys to pool). **6.** Continue to Catalog ID setup. Add / Edit Catalog Item and select the correlating License Group from the License Group Field.	Refer to IXP documentation: **1.** Product Management template **2.** Add-Update License Groups transaction. **3.** Add Licenses to Pool transaction (initial license key load or refill). **4.** Add-Update Catalog Item transaction. Populate the **Intraware License Group ID** to the Catalog Item set up for the field header **Intraware License Group ID**.	N/A

Table 8-2 ▪ Entitlement License Pool (Level Catalog Item) Style

Process	FlexNet Operations LLM Producer Portal	XML Transaction or IXP Processor	End User Portal
Delivery	Create Entitlement for an Account: 1. From the View Account display, select **Entitle, > Entitle Account**. 2. Populate relevant fields to complete order submission, and submit form by clicking **Entitle Account**. 3. For Catalog Items set up with a License Group pool, the FlexNet Operations LLM Producer Portal system will automatically pull a key from the pool for the Order line.	Refer to IXP documentation: 1. Entitlement Management Template 2. Use one of these transaction templates appropriate for your process: • Add Order • Edit Order • Process Order 3. For Catalog Items set up with a License Group pool, the FlexNet Operations LLM system will automatically pull a key from the pool for the Order line.	During the Order transaction, the FlexNet Operations LLM system by default will send the End User specified on the Order an **Order Email**. The **Order Email** template can be set up to contain a merge tag to display the License Key text in the customized email to the end user.

Table 8-2 ▪ Entitlement License Pool (Level Catalog Item) Style

<table>
<tr><th>Process</th><th>FlexNet Operations LLM Producer Portal</th><th>XML Transaction or IXP Processor</th><th>End User Portal</th></tr>
<tr><td rowspan="2">Tracking/ Reporting</td><td>Options:
1. Send a real-time copy of the Order Email by using the option to Copy as BCC on the Entitle Account form.
2. View order history from the View Account display (View > View Entitlements).
3. Send a transaction record via email by using the Email for Report option on the Entitle Account form.</td><td>Options:
1. Send a real-time copy of the Order Email; use the field NotificationBCC on one of these transaction templates appropriate for your process:
• Add Order
• Edit Order
• Process Order
2. Specify the email address to send transaction record by using the Email for Report option on the Upload a Transaction File function in FlexNet Operations LLM Producer Portal (IXP method).
3. Refer to XML schema, located in the FlexNet Operations LLM Release Notes, for Setup, Delivery, and to specify a transaction record.</td><td rowspan="2">Once the Order transaction is successfully processed by FlexNet Operations LLM, the License Key is assessable from the License Key link on the Download page, Order History page, or Index page, depending on your implementation.</td></tr>
<tr><td colspan="2">FlexNet Operations LLM Reporter: Create an Entitlement Report to obtain tracking of license keys by Account.</td></tr>
</table>

Binary License File Style

In this method, a Binary License File is sent by order line in an Order transaction to FlexNet Operations LLM (one key per Catalog Item ordered). Revenera charges a fee for implementation of this functionality. If you would like to enable Binary License File Support, or would like additional information on this feature, please contact your Account Manager/Project Manager.

Table 8-3 ▪ Binary License File Style

Process	FlexNet Operations LLM Producer Portal	XML Transaction or IXP Processor	End User Portal
Setup	1. Product Management 2. Configure 3. Add License Group 4. Create License Group and use the attribute for the License Style field, **Entitlement Binary License Key (Level Catalog Item)** 5. Add / Edit Catalog Item and select the correlating License Group from the License Group Field.	Refer to IXP documentation: 1. Product Management template 2. Add-Update License Groups transaction 3. Add-Update Catalog Item transaction. Populate the **Intraware License Group ID** to the Catalog Item set up for the field header **Intraware License Group ID**.	N/A
Delivery	Upload license files for each Order line from the Entitle Account form in FlexNet Operations LLM Producer Portal: 1. Use the standard **Browse** functionality from your web browser to find and add the license file to the **Entitle Account** form.	The order line element within the Order Transaction Schema has an additional field of `<LicenseFileName>`. To load a license file, set the filename field and populate the `<LicenseCode>` field with the Base64 encoded representation of the license file. For example: `<SKU>MY-PART-NUMBER</SKU>` `<Quantity>10</Quantity>` `<LicenseFileName>license.txt` `</LicenseFileName>` `<LicenseCode>bGljZW5zZSBm` `aWxlIGNvbnRlbnQ=</LicenseCode>` The filename you specify will be the filename used when the license file is downloaded to the end user.	Binary License files are accessible in the FlexNet Operations LLM service in the same way the plain text licenses are made available. This can be from the **License Key** link on the **Download** page, **Order History** page, or **Index** page, depending on your implementation. There are following two types of licenses that are displayed differently: ● Plain text licenses are displayed on the page ● Binary license files appear as a link from which you are able to download the file.

Table 8-3 ▪ Binary License File Style

Process	FlexNet Operations LLM Producer Portal	XML Transaction or IXP Processor	End User Portal
Tracking	After you have processed the order, the filename will be displayed for future reference. By clicking on the filename, you can download the license file so that you can verify its content.	Refer to XML schema, located in the FlexNet Operations LLM Release Notes, on how to specify a transaction record if using a Datafeed Client to submit XML transactions to FlexNet Operations LLM.	Depending on the user's browser configuration for specific file types, some files may render directly in the browser, rather than display a **Save As** dialog box.

License Generators for Order-Based License Keys

Revenera also offers customizations to generate License Keys when triggered by an Order transaction to FlexNet Operations LLM. Some variations of customized styles include:

- FlexLM where the license generator is hosted by the manufacturer.
- Revenera-hosted license generators.
- Revenera-hosted license generation for 'home-grown' license styles.

Revenera charges a fee for implementation of this functionality. If you would like to enable this functionality, or would like additional information on this feature, please contact your Account Manager/Project Manager. You can also review the Getting Started considerations below.

FlexNet Operations LLM License Styles – End User Based

Revenera customizes different solutions that give End Users the capability to generate Licenses on demand from the End User Portal. Permission-based privileges can also grant Administrators the ability to generate License Keys on behalf of the End User from FlexNet Operations LLM Producer Portal. Once implemented by Revenera, some definitions will need to be set up on the Product ID level to use the functionality. Some variations of customized styles include:

- Setting up purchase limits by Account, along with usual Entitlements. The cost of the license is subtracted from the purchase balance of the Account. The FlexNet Operations LLM application will prevent the user from generating a license if there insufficient funds available in their balance.
- FlexLM floating license with or without host ID
- FlexNet Operations
- Revenera-hosted license generation for "home-grown" license styles allowing for customer data entry if needed.

Revenera charges a fee for implementation of this functionality. If you would like to enable this functionality, or would like additional information on this feature, please contact your Account Manager/Project Manager.

Token-Based Licensing

As part of Revenera's solution to support licensing, a component will exist to support token based licensing. The concept of token based licensing is to allow end user access to licenses via a code or token. The token will contain all of the information necessary to entitle a user to a specific license. Upon registration with the Token a normal Entitlement will be created based upon the information entered with the Token.

Revenera supports two methods of token based licensing:

- **Anonymous Token Licensing (ATL)**—The first method is Anonymous Token Licensing (ATL) where an end user does not have to provide any information besides the token in order to obtain a license.
- **Registered Token Licensing (RTL)**—The second method of token based licensing is Registered Token Licensing (RTL) in which case the end user is required to create a user profile and provide the information from the token before being able to obtain a license.

Getting Started

This section contains questions to help you identify the business process and processes involved for the actual generation of the license. It is not unusual to use home grown or multiple licensing styles across different product lines. Your answers to these considerations will facilitate the Engineering discussion to scope out the planning and effort to manage your different licensing styles from FlexNet Operations LLM.

- General Considerations
- Business Process / Use Case Considerations

General Considerations

The following table lists general considerations for licensing.

Table 8-4 ▪ General Considerations

Licensing Question	Notes
Provide a high level description of the current license generation process.	
How many different license generators?	
How many different licensing keys does each generator produce?	
Is there current documentation describing the current	If no, proceed to Business Process / Use Case Considerations.

Business Process / Use Case Considerations

The following table lists business process / use case considerations for licensing.

Table 8-5 ▪ Business Process / Use Case Considerations

Licensing Question	Notes
What type of licenses do you distinguish (concurrent, served, node-locked, etc)?	
How long is a license valid for?	
What end user information is needed to generate a license?	
How do you determine what kind of license to generate?	
Where does all the input information come from?	
What information is stored in the product (and therefore the same for every customer that purchases it)?	
What information is stored in the order (and therefore different for every customer)?	
Is the license a separate Order Line or part of the SKU that is being purchased?	
Is the user allowed to re-host a license? What are the limitations?	
When a new release becomes available: Does the user need a new license? **Is the user entitled to a new license?** **Does a new release require an additional order?**	
If the license key has an expiration date, what is the maintenance process (renewal) entail? **Does the user pay another year and receive a new license key?**	
What is the process to purchase additional seats?	

Electronic Licensing Summary

This following sections provides more insight about the difficulties of license management and advantages of using Electronic Licensing:

- Challenges
- Benefits

Challenges

The larger challenge of license management occurs from a combination of factors that can also make licensing confusing to customers:

- Acquisitions
- Home-grown solutions
- Multiple digital rights management vendors
- Export controls
- Customer input parameters
- Manual generation / distribution

Benefits

The benefits of Electronic License Delivery include:

License Keys

- Unlock functional software modules
- Allow software to run for a certain period
- Can specify who is authorized to use

Locksmith Role

- Generate the right keys for each customer
- Understanding rules to create the keys

Electronic Delivery

- Instantaneous and accurate
- Convenient on-demand generation
- Reportable

Summary

This document provides the best practices for standard Electronic License Delivery from FlexNet Operations LLM. Your insight to the business processes and use cases relevant to your organization will help determine the most efficient approach to integrating your various licensing schemas to FlexNet Operations LLM.

FlexNet Operations LLM offers the use of License templates and enforcement rules for License generation which will simplify labor intensive and manual administration. As such, FlexNet Operations LLM goes beyond home-grown or 3rd party alternatives for Entitlement-control access to licenses.

FlexNet Operations LLM is capable of plugging in any license technology. By these means, integrating Electronic License Delivery as part of the overall FlexNet Operations LLM end user experience will also allow you to operate and maintain ELD with the same service levels as Electronic Software Delivery from FlexNet Operations LLM.

9

FlexNet Embedded Licensing

FlexNet Operations enables high-tech hardware and software manufacturers to increase revenues, reduce support costs, and simplify customer relationships. It provides a single entitlement management system, enabling manufacturers to quickly create versatile product configurations and manage multiple licensing technologies.

FlexNet Operations also enables you to flexibly price, package, protect, and update your product offerings while profitably managing licenses throughout their lifecycle.

This guide explains the basic concepts and tasks you need to package a product and generate license rights using FlexNet Embedded technology. It also provides information about managing the lifecycle of a device and other advanced topics.

Table 9-1 ▪ Getting Started With FlexNet Embedded Licensing

Section	Description
Overview	Provides an overview of the Getting Started information, FlexNet Embedded License Technology, and tasks to complete before you begin using FlexNet Operations.
Quick Start Example	Provides basic procedures to set up a device series, device model, and device with licensing using sample data. This section also includes procedures to test the licensing.
Managing Devices	Provides instructions for typical tasks you might perform while managing devices throughout their lifecycle.
Managing Servers	Discusses the use and management of FlexNet Embedded license servers.
Advanced Topics	Provides explanation for more advanced FlexNet Embedded and FlexNet Operations concepts and procedures for more complex configurations.

Overview

Before performing the FlexNet Embedded Licensing exercises, review the following information.

- Intended Audience
- FlexNet Embedded License Concepts
- Before You Begin

Intended Audience

The primary audience for this section includes FlexNet Embedded developers and other IT operations personnel responsible for setting up devices and licenses using FlexNet Operations. This guide is also intended to support product marketing.

FlexNet Embedded License Concepts

FlexNet Embedded license technology is intended for but not limited to use with high-tech hardware devices with these characteristics:

- A limited amount of volatile and non-volatile memory.
- A limited runtime environment.
- Limited or no network connectivity.
- Typically uses a real-time operating system like Windows CE, Embedded Linux, or VxWorks.
- Possibly no keyboard or display. Without user intervention, the device automatically checks its license rights to determine its behavior and functionality.

Software on each device controls the feature set expressed on the particular device model. If the device has internet connectivity, it can connect directly to the FlexNet Operations back office and receive the license for its particular feature set. You can also activate a device offline or using a FlexNet Embedded license server. The following diagram shows the relationship between the FlexNet Operations back office, FlexNet Embedded clients, and a FlexNet Embedded license server.

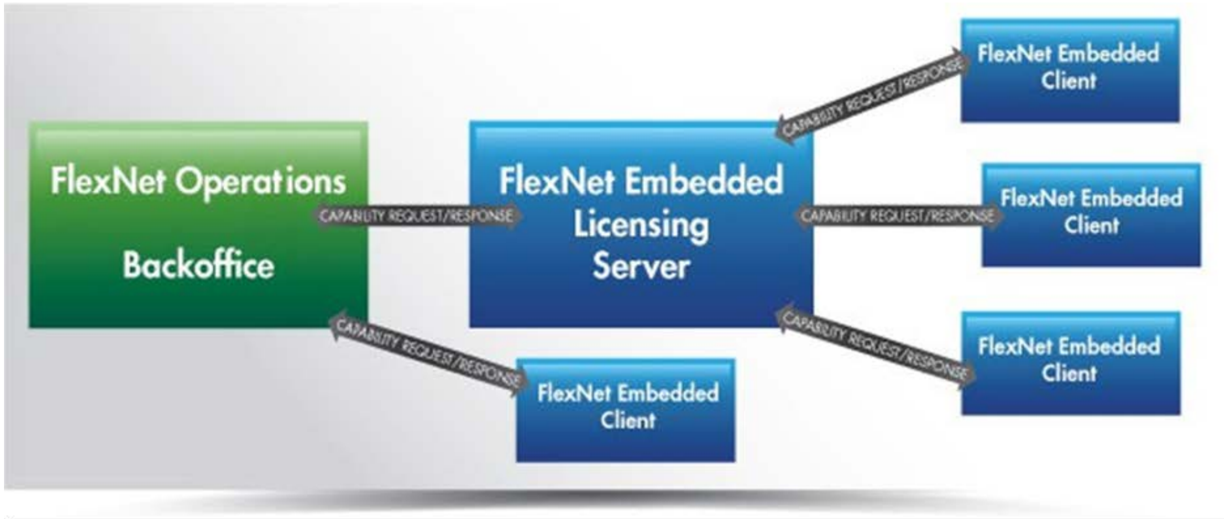


Figure 9-1: FlexNet Embedded License Technology

Note ▪ *See Managing Servers for more information about using FlexNet Embedded license servers and Offline Activation for more information about Offline Activation.*

You can also use FlexNet Embedded license technology for traditional software applications. FlexNet Embedded can be easily integrated into publisher software to make it capable of enforcing software license models such as perpetual license, subscription license, or demo license.

When a FlexNet Embedded client or server communicates with the FlexNet Operations back office to install or update dynamic license rights, the communications involve capability requests and capability responses.

- A **capability request** is generated when a device directly requests features or a server requests a pool of features to serve to devices. The request data contains some combination of a device identifier, one or more rights identifiers, and any other manufacturer-defined data to pass to the back office.
- The back office then processes the request, reading the various identifiers and custom data. If the back office determines the device rights should be fulfilled or updated, it generates a **capability response**. The response data contains current license rights available for the device. The capability response is then conveyed back to the device, and the license rights are stored in trusted storage and can be acquired.

Before You Begin

Before using a FlexNet Embedded license technology, you must first install and configure the FlexNet Embedded toolkit and the cloud-hosted edition of FlexNet Operations to work together. Before you continue, make sure you have access to the following applications:

- FlexNet Operations LLM Producer Portal and Enterprise Portal

  Note ▪ *You must also make sure you have the necessary permissions to perform specific processes using the Producer Portal. Permissions provides a list of permissions required for each process.*

- FlexNet Embedded Licensing Toolkit
- .NET Toolbox Device application

Quick Start Example

The purpose of this section is to walk you through the basic steps required to add and configure a standalone device that connects to the FlexNet Operations back office over the Internet.

Table 9-2 ▪ Quick Start Example

Section	Description
Setup	Describes the tasks to prepare for creating a device, including setting up an identity and publisher and downloading the FlexNet Embedded toolkit.
Creating an Account and a Member	Describes the steps to create an account and add yourself as a member.
Adding Device Capabilities	Describes the steps to add device capabilities.
Creating a Device	Describes the steps to create a device and assign the device to an account.
Creating and Configuring Add-Ons	Describes the steps to create a manufacturer, product line, and a catalog item with add-ons and how to configure FlexNet licensing for that catalog item.
Entitling an Account and Mapping an Add-On	Describes the steps to entitle a specific account to a catalog item and map an add-on to a device.
Using the Enterprise Portal	Describes how to test a license using the .NET Toolbox Device application.

Roadmap for Lifecycle Management Tasks and Advanced Topics

For information on roadmap lifecycle management tasks and advanced topics, see the following:

- See Managing Devices for tasks related to managing devices over their lifecycle.
- See Managing Servers for more advanced tasks and topics, including using FlexNet Embedded licensing servers.
- See Advanced Topics for additional device creation and activation strategies, license model options, and more.

Setup

Before using a FlexNet Embedded license technology, you must first access the FlexNet Operations LLM Producer Portal to set up a publisher and identity. A publisher identity is binary data that contains a publisher or manufacturer name and encryption data. A publisher is needed to identify who the licenses belong to and who can validate the license. An identity is used to secure communication between back office and device.

- Accessing the FlexNet Operations Producer Portal
- Setting Up a Publisher
- Setting Up an Identity
- Setting Up the FlexNet Embedded Toolkit

Accessing the FlexNet Operations Producer Portal

Use the following steps to access the FlexNet Operations Producer Portal.

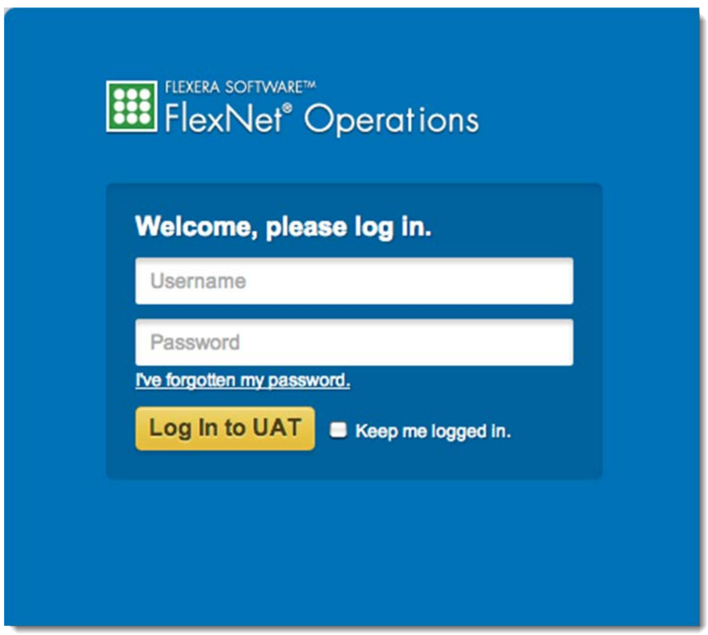


Figure 9-2: FlexNet Operations Producer Portal

Task ***To Access the Producer Portal***

1. Open a web browser and enter the following URL:

   https://manageruat.flexnetoperations.com

   Note ▪ *The URL for the production environment is https://manager.flexnetoperations.com. When you perform the tasks for this Quick Start example, use the user acceptance test (UAT) environment URL provided in Step 1.*

2. Enter your username and password then click **Log In to UAT**.

***Note** ▪ Use the username and password that was provided by Revenera. If you forget your password, click **I've forgotten my password**. If you no longer have your username, contact Revenera Support.*

Setting Up a Publisher

Revenera supplies you with a unique publisher name and a series of five publisher keys. You use this name and these keys to set up a publisher. The keys cannot be regenerated or duplicated. Contact Revenera if you do not have your publisher keys. Use the following steps to set up a publisher.

Task ***To set up a publisher:***

1. Select the **Manage Hosts** menu then click **Add Publisher**.

2. Type the name Revenera provided for your company in the **Publisher Name** field.
3. Type the full name of your organization in the **Notes** field.
4. Type the publisher keys Revenera provided into the **Publisher Keys** fields.
5. Click **Add Publisher**.

Setting Up an Identity

A publisher can define any number of identities, each providing a different level of security for different classes of devices or licenses. For example, a line of high-end devices may have higher security than a line of low-end devices. Use the following steps to set up an identity.

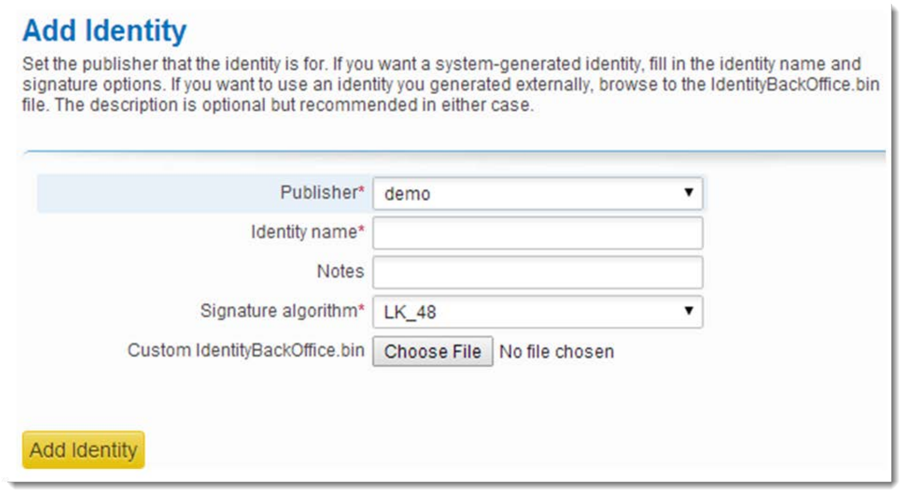


Figure 9-3: Add Identity

Task ***To set up an identity:***

1. Select the **Manage Hosts** menu then click **Add Identity**.
2. Select the publisher you created from the **Publisher** drop-down menu.
3. Type a unique name in the **Identity Name** field. You will refer to this identity name when you create a device model.
4. Type any additional details you want to list about the identity in the **Notes** field. This field is optional.
5. Select an algorithm used to generate digital signatures from the **Signature Algorithm** drop-down menu.

   Note ▪ *For this example, select any algorithm. For further details regarding digital signatures and algorithms, see Digital Signature Algorithm. Also, the* ***Custom IdentityBackOffice.bin*** *field is not mandatory. For this example, leave it blank.*

6. Click **Add Identity**.

Setting Up the FlexNet Embedded Toolkit

You need to install and configure the FlexNet Embedded Licensing Toolkit. This requires the following tasks:

- Installing and Configuring the Toolkit
- Building Product Binaries
- Open the .NET Toolbox Device Application

Installing and Configuring the Toolkit

Install and configure the FlexNet Embedded Licensing Toolkit as explained in the FlexNet Embedded documentation. Consult the user guide and getting started guide for your FlexNet Embedded toolkit. For example, if you are using the FlexNet Embedded C SDK, consult the *FlexNet Embedded & FlexNet Connect C SDK User Guide* and the *FlexNet Embedded C SDK Getting Started Guide*.

Building Product Binaries

Using the FlexNet Embedded Toolkit, your development team needs to create Flex-enabled product binaries that are able to take advantage of the FlexNet licensing technology. Some sample license-enabled code is included in your FlexNet Embedded toolkit. Consult the user guide for your FlexNet Embedded toolkit for details.

Open the .NET Toolbox Device Application

The .NET Toolbox is a pre-built executable with which you can explore various licensing processes and scenarios. For more information on using the .NET Toolbox device application, see the *FlexNet Embedded .NET XT SDK User Guide*.

Creating an Account and a Member

After you complete the initial setup for FlexNet Operations, you need to create a test account and add yourself as a member. Revenera created an account for you, but you will create a test account for this quick start example. Use the following steps to add an account and a member associated with that account. Use default settings whenever they appear.

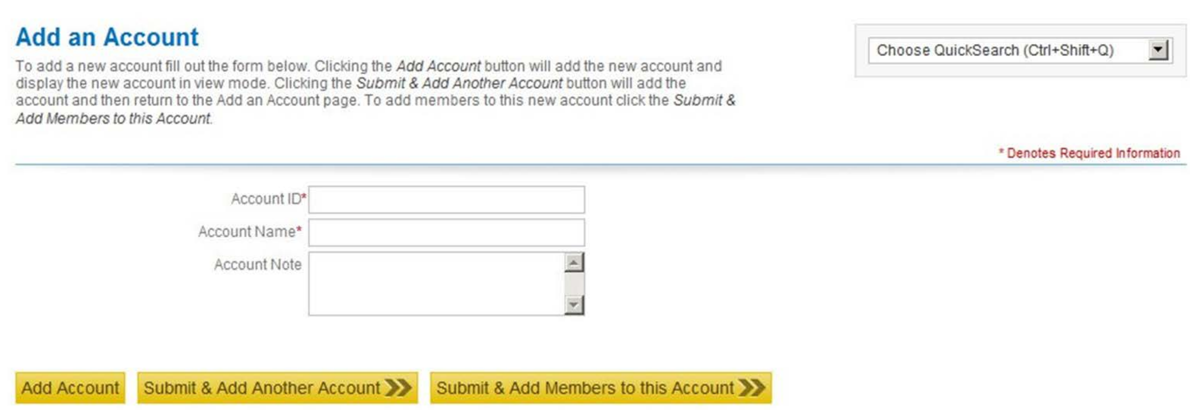
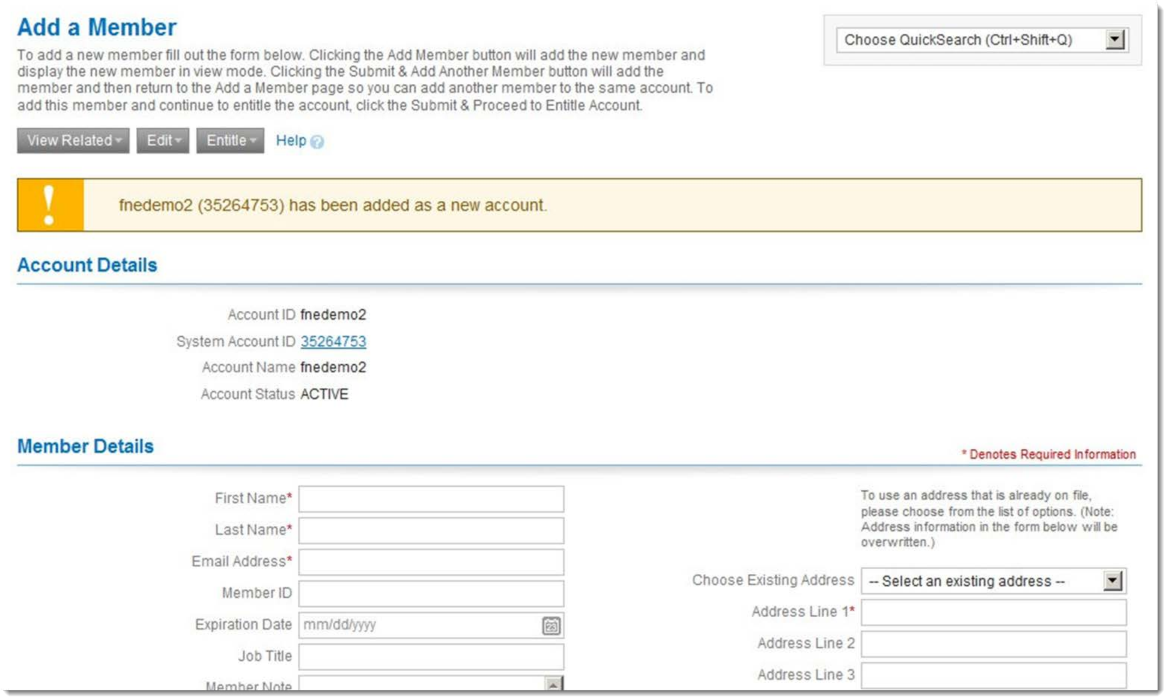


Figure 9-4: Add an Account

Task ***To add an account and a member:***

1. Select the **Manage Accounts** menu then click **Add Account**.
2. If you have your own unique identifier that you would like to use for this account, type the unique back office identifier for the account in the **Account ID** field. This field is optional.
3. Type a description in the **Account Name** field. The account name is typically the name of your end customer.

4. Click **Submit & Add Members to this Account**. The Producer Portal opens the **Add a Member** page.



5. Populate the following fields to add a member to the account you just created:
   - **First Name**
   - **Last Name**
   - **Email Address**
6. Select an existing address from the **Choose Existing Address** drop-down menu or populate the following fields:
   - **Address Line 1**
   - **City**
   - **State**
   - **Postal Code**
   - **Country**
7. Click **Add Member**.

Adding Device Capabilities

Device capabilities are the licensed features contained within the license that are used to tell the device what features are available to the user and in what capacities. A feature can be counted, meaning that acquisitions of that feature may succeed or fail based on a count to be acquired, or uncounted, meaning that acquisitions of arbitrary count of that feature are allowed as long as the feature is present.

Note ▪ *For more explanation about counted and uncounted features, see Counted and Uncounted Capabilities.*

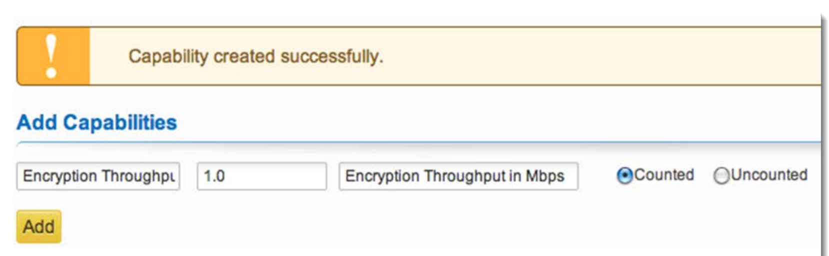
This task includes some example suggestions based on the example presented in Device Series and Device Model Concepts, For this quick start example, use the following steps to add three device capabilities:

- Simultaneous Users (counted)
- Encryption Throughput (counted)
- Redundancy (uncounted)

Task ***To add device capabilities:***

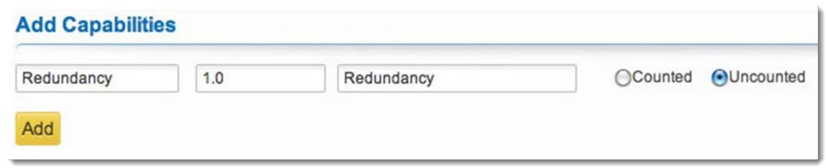
1. Select the **Manage Hosts** menu then click **Add Capability**.

2. Type a name for the capability in the Feature Name field. For this example, use SimultaneousUsers.
3. Type a description for the capability in the Description field. For this example, use Number of Simultaneous Users.
4. Type a version number for the capability in the Feature Version field. For this example, use 1.0.
5. Select the Counted Yes radio button to indicate acquisitions of this capability may succeed or fail based on a count.
6. Click Add Capability. The Producer Portal opens the List Capabilities page and shows a message to indicate that the capability was created successfully.



7. On the **List Capabilities** page, use the fields under **Add Capabilities** to add the **Encryption Throughput** capability. Type a name for the capability in the **Feature Name** field. For this example, use `Encryption_Throughput`.

8. Type a version number for the capability in the **Feature Version** field. For this example, use `1.0`.
9. Type a description for the capability in the **Description** field. For this example, use `Encryption Throughput in Mbps`.
10. Select the **Counted** radio button to indicate acquisitions of this capability may succeed or fail based on a count.
11. Click **Add**. The capability is added to the list of **Existing Capabilities**.



12. On the **List Capabilities** page, use the fields under **Add Capabilities** to add the Redundancy capability. Type a name for the capability in the **Feature Name** field. For this example, use `Redundancy`.
13. Type a version number for the capability in the **Feature Version** field. For this example, use `1.0`.
14. Type a description for the capability in the **Description** field. For this example, use `Redundancy`.
15. Select the **Uncounted** radio button to indicate this is a capability that is not counted but rather turned on or off.
16. Click **Add**. The capability is added to the list of **Existing Capabilities**.

Creating a Device

You are now ready to add a device and assign it to an account. The following tasks are required.

Table 9-3 • Creating a Device

Task	Description
Adding a Device	Describes the steps for adding a device in the Producer Portal.
Assigning a Device to an Account	Explains how to assign a device to an account in the Producer Portal.
Testing the Base License Using the .NET Toolbox Device Application	Discusses the use of the .NET Toolbox device application to test the base license.

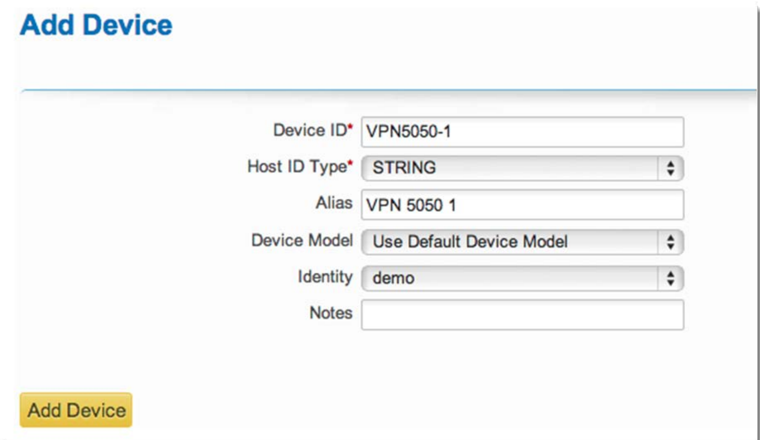
These tasks include some example suggestions based on the example presented in Device Series and Device Model Concepts.

Adding a Device

Use the following steps to add a device. For settings on the **Add Device** page that are not specified in the steps, below, no changes are necessary.

Task ***To add a device:***

1. Select the **Manage Hosts** menu then click **Add Device**.



2. Type a unique identifier for the device in the **Device ID** field. For this example, use `VPN5050-1`.
3. Type a description for the device in the **Alias** field. For this example, use `VPN 5050 1`.
4. Select the identity you created earlier from the **Identity** drop-down menu. In this example, we have used `demo`.
5. Type additional information as needed in the **Notes** field. This is optional.
6. Click **Add Device**. A message appears indicating that the device was added successfully.

Assigning a Device to an Account

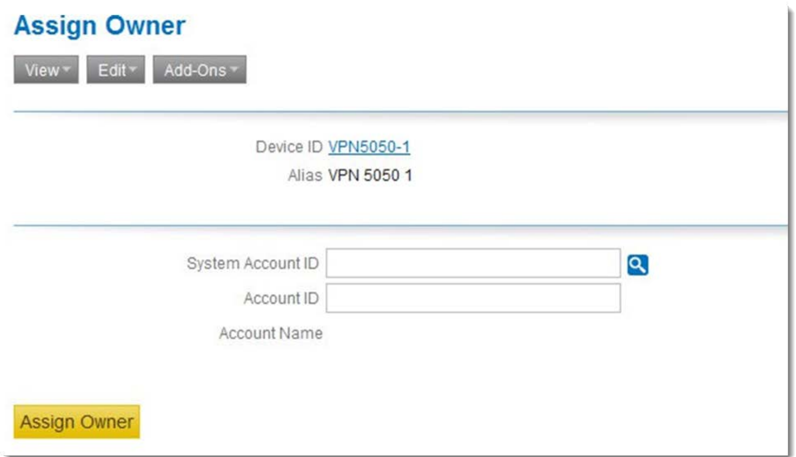
Use the following steps to assign an account to the device you added.

Tip *▪ Devices can also self-register to an account during the activation process. For further details on this, see Device Creation.*

Note *▪ The following steps assume that you just completed the steps in Adding a Device and ended up on the **View Device** page for your device. If not, use the **Search Devices** page to locate your device (**Manage Hosts > Search Devices**) and then click its Device ID to open the **View Device** page.*

Task ***To assign a device to an account:***

1. On the **View Device** page, select the **Edit** menu then click **Assign Owner**.



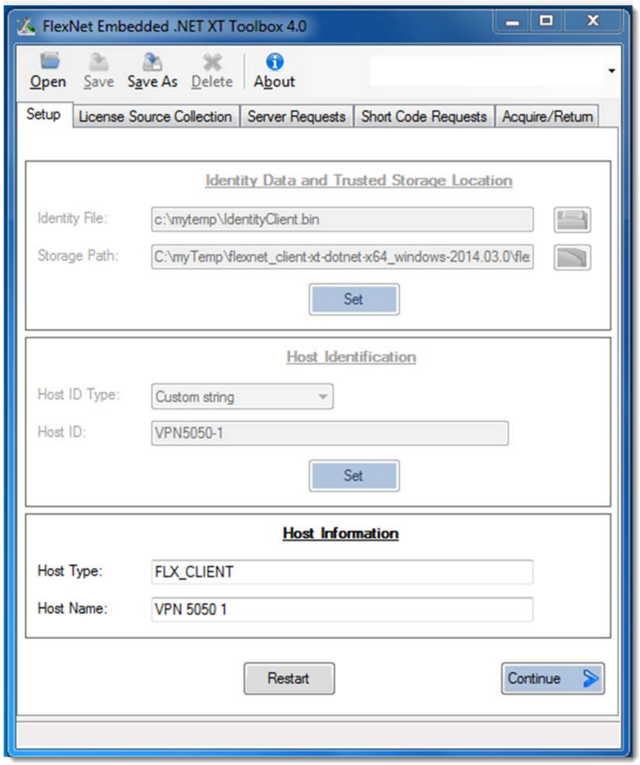
2. Click the search icon next to the **System Account ID** field.
3. Type the account name for the account in the **Account Name** field then click **Search**. Use the account you created in Creating an Account and a Member.
4. Click the account name. The system account ID, account ID, and account name appear in the applicable fields.
5. Click **Assign Owner**.

Testing the Base License Using the .NET Toolbox Device Application

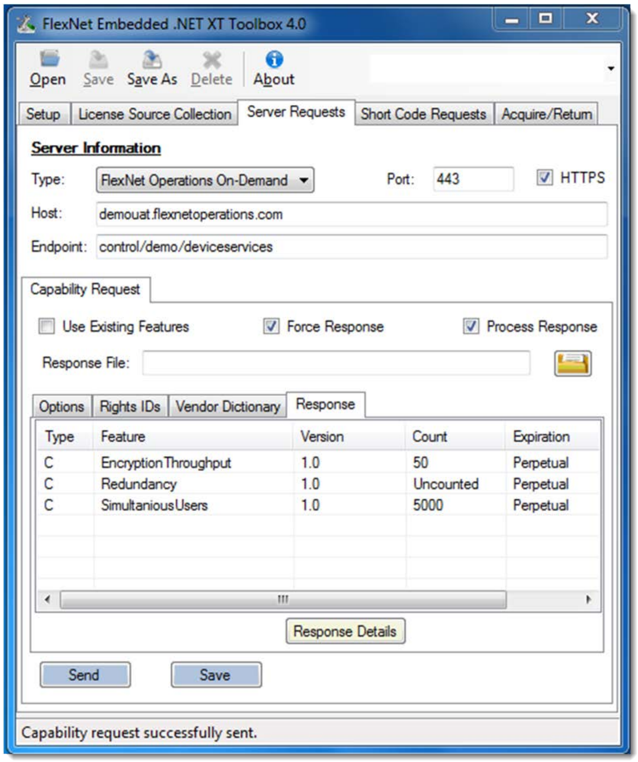
To test device licensing using the .NET Toolbox device application, you must install and configure the .NET Toolbox device application. Use the following steps to test device licensing using the .NET Toolbox device application.

Task ***To test device licensing using the .NET Toolbox device application:***

1. From the Producer Portal, select the **Manage Hosts** menu then click **List Identities**.
2. Click the **Identity Name**. This opens the identity’s **View Identity** page.
3. Under **Identity Files**, find **Download Client Identity** and click **Binary File**. Download behavior varies depending on the web browser you are using.
4. Save the binary client identity file (`IdentityClient.bin`) to your machine.
5. Open the .NET Toolbox device application from `<installdir>\bin\demo\toolbox\DotNetDemo.exe`. The **Setup** tab appears.



6. Click the folder icon next to the **Identity File** field and browse the location where you saved the client identity `.bin` file. Double-click the `.bin` file. The file path is populated in the **Storage Path** field.
7. Click **Set**. When the identity data is set, the **Host Identification** fields are enabled.
8. For **Host ID Type**, select **Custom string**.
9. For **Host ID**, type the Device ID of the device you created in Adding a Device. For this example, use **`VPN5050-1`**. Click **Set**.
10. Type the device model name in the **Host Type** field. For this example, use the default device model name, **`FLX_CLIENT`**.
11. Type the device alias in the **Host Name** field. For this example, use **`VPN 5050 1`**.
12. Click the **Server Requests** tab.



13. Select **FlexNet Operations On-Demand** from the **Server Type** drop-down menu. The **Host**, **Port** and **Endpoint** fields are updated.

14. Type **<your_site_name>uat.flexnetoperations.com** into the **Host** field.

15. Click the **Response** tab then click **Send**. The device details appear, including capabilities included in the base license for the device model.

Creating and Configuring Add-Ons

Add-ons are catalog items you create to represent a license change that grants additional capabilities or capacity for a device. Following the description in Device Series and Device Model Concepts, for example, an add-on catalog item for a device in the VPN5000 series would be additional simultaneous users or additional throughput.

You must create a manufacturer and product line before you can create an add-on catalog item. After you create an add-on, you configure FlexNet licensing for that catalog item. The following tasks are required:

- Creating a Manufacturer and a Product Line
- Adding a Catalog Item
- Configuring FlexNet Licensing for a Catalog Item

These tasks include some example suggestions based on the example presented in Device Series and Device Model Concepts.

Creating a Manufacturer and a Product Line

Before you create a catalog item, you must create a manufacturer and a product line. They are required attributes for creating catalog items but have no impact on licensing functionality. The following tasks are required to add a manufacturer and product line.

- Adding a Manufacturer
- Adding a Product Line

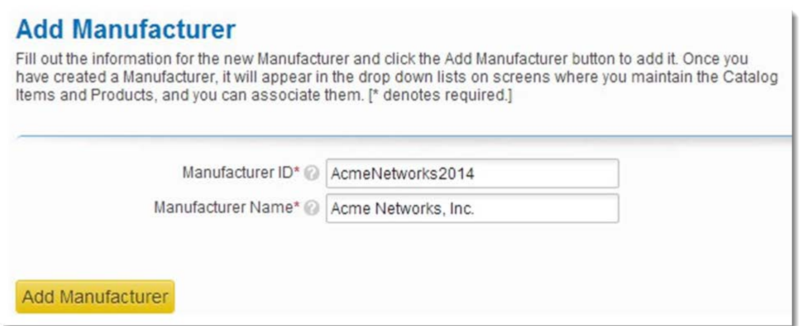
These tasks include some example suggestions based on the example presented in Device Series and Device Model Concepts.

Adding a Manufacturer

Use the following steps to add a manufacturer. Once you have created a manufacturer, it appears as a selection in the drop-down menus on pages you use to create catalog items.

Task ***To add a manufacturer:***

1. Select the **Package Products** menu then click **Add Manufacturer**.



2. Type a unique identifier for the manufacturer in the **Manufacturer ID** field. For this example, use **`AcmeNetworks2014`**.

   Note *▪ The **Manufacturer ID** must be alphanumeric format and must match the following regular expression: `[A-Za-z0-9]+`. For example, `BS92` is acceptable, but `BS_92` is not.*

3. Type a short description for the manufacturer in the **Manufacturer Name** field. For this example, use **`Acme Networks, Inc`**.

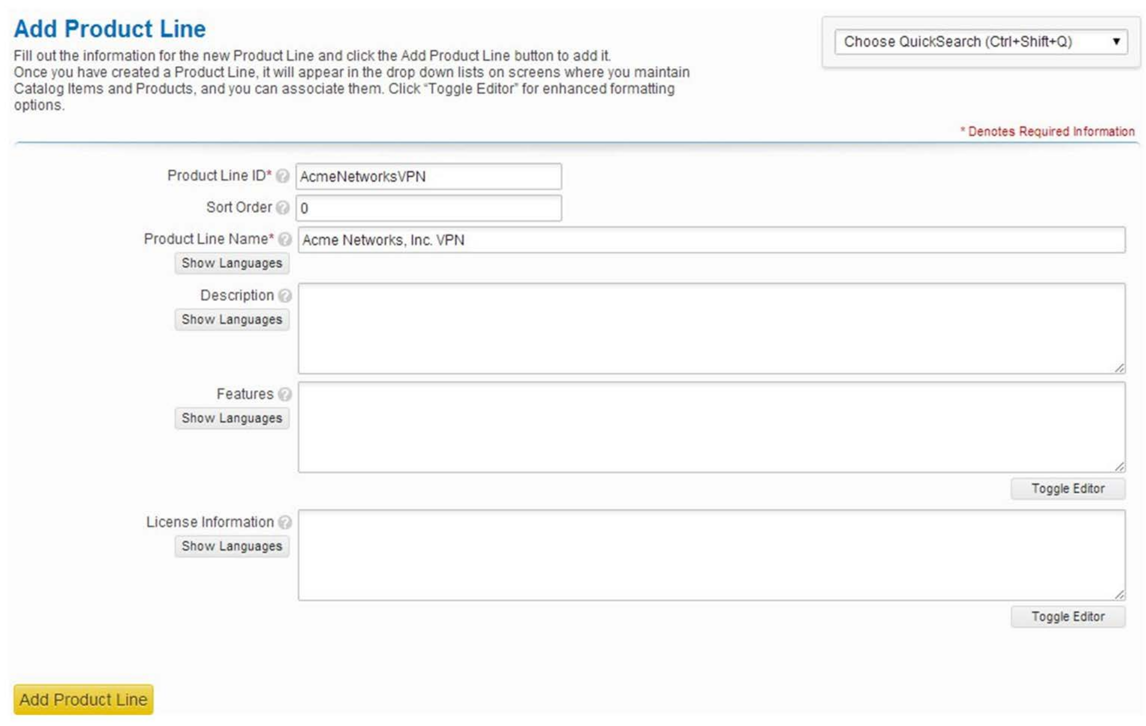
4. Click **Add Manufacturer**.

Adding a Product Line

A product line defines the hierarchy of products and the navigation within the FlexNet Operations Enterprise Portal. Use the following steps to add a product line.

Task ***To add a product line:***

1. Select the **Package Products** menu then click **Add Product Line**.



2. Type a short description for the product line in the **Product Line ID** field. For this example, use **`AcmeNetworksVPN`**.

3. Type a detailed description of the product line in the **Product Line Name** field. For this example, use **`Acme Networks, Inc. VPN`**.

4. Click **Add Product Line**.

Adding a Catalog Item

Use the following steps to create an add-on using a catalog item. For this example, you will create a catalog item for additional encryption throughput.

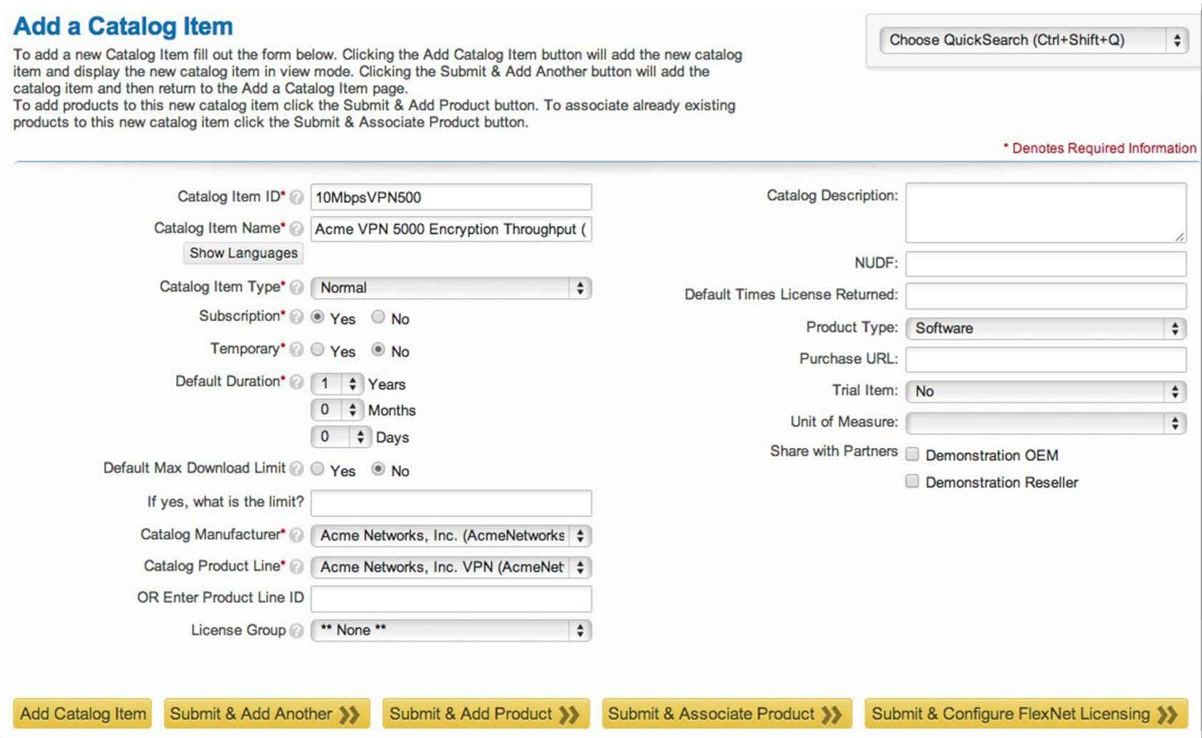


Figure 9-5: Add a Catalog Item - VPN 5000 Encryption Throughput (10Mbps)

Task ***To add a catalog item:***

1. Select the **Package Products** menu then click **Add Catalog Item**.
2. Type a unique ID for the catalog item in the **Catalog ID** field. The **Catalog ID** is typically your internal Part Number/Stock Keeping Unit (SKU) for the add-on. For this example, use `10MbpsVPN5000`.
3. Type a short description for the catalog item in the **Catalog Item Name** field. For this example, use `Acme VPN 5000 Encryption Throughput (10 Mbps)`.
4. Select a manufacturer from the **Catalog Manufacturer** drop-down menu. For this example, select **Acme Networks, Inc.**
5. Select a product line from the **Catalog Product Line** drop-down menu. For this example, select **Acme Networks, Inc. VPN**. Use defaults for all other fields.
6. Click **Submit & Configure FlexNet Licensing**. A message appears indicating that the catalog item was successfully added, and the Producer Portal opens the **Configure FlexNet Licensing** page.

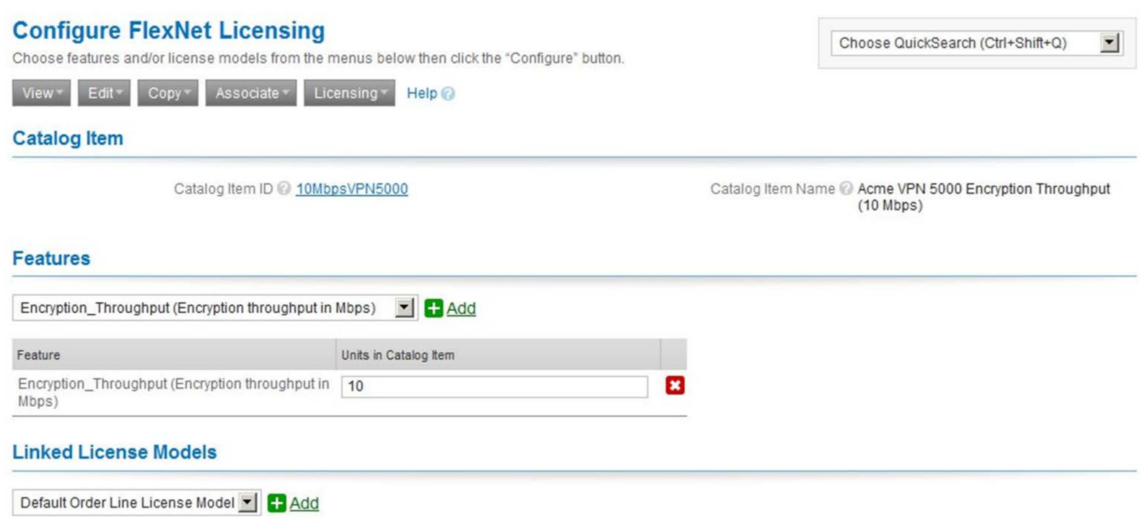
Configuring FlexNet Licensing for a Catalog Item

Use the following steps to configure FlexNet licensing for a catalog item.

Note ▪ *The following steps assume you are on the View Catalog Item page having just completed the task in Adding a Catalog Item. If not, use the **Search Catalog Items** page (**Package Products > Search Catalog Items**) to locate your catalog item and then click its system catalog item ID in the search results. This link opens the **View Catalog Item** page for your catalog item. Then, on the **View Catalog Item** page, click **Edit > Configure FlexNet Licensing**.*

Task ***To Configure FlexNet Licensing for a Catalog Item***

1. On the **Configure FlexNet Licensing** page, use the **Features** control to select the device capability to which this catalog item is related, and then click **Add**. For this example, select **Encryption_Throughput**.



2. Type the amount of additional units associated with the specific capability for this catalog item in the **Units in Catalog Item** field. For this example, use `10`. (This value represents a 10 Mbps increase.)

   Note ▪ *You can add multiple capabilities or features to a single catalog item.*

- Keep the default license model—**Default Order Line License Model**—in the **Linked License Models** drop-down menu then click **Add**.

3. Click **Configure**. The Producer Portal shows a message confirming that FlexNet Licensing was successfully configured.

Entitling an Account and Mapping an Add-On

You can entitle an account to a specific catalog item. A catalog item has one, pre-defined set of FlexNet Embedded licenses. The terms of these licenses are defined for each customer using line items. Then you can map the add-on to a specific device. Use the following tasks to entitle an account and map an add-on to a device:

- Entitling an Account

- Mapping an Add-On to a Device
- Testing an Add-On Using the .NET Toolbox Device Application

Entitling an Account

Use the following steps to entitle an account to a catalog item.

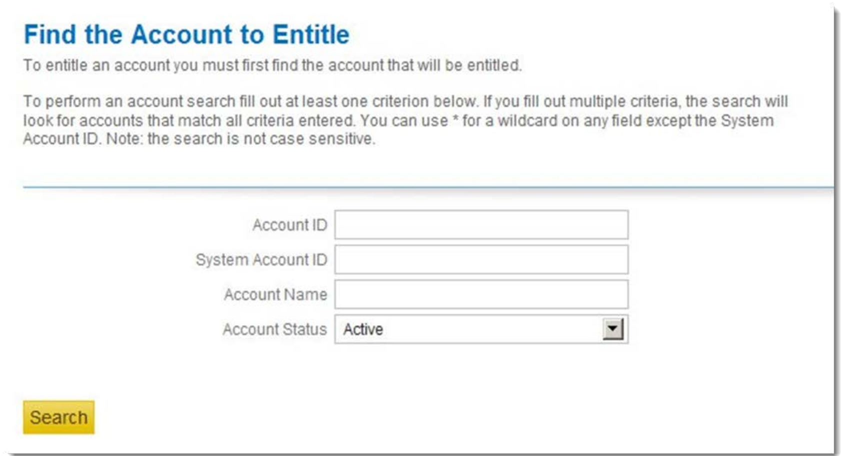
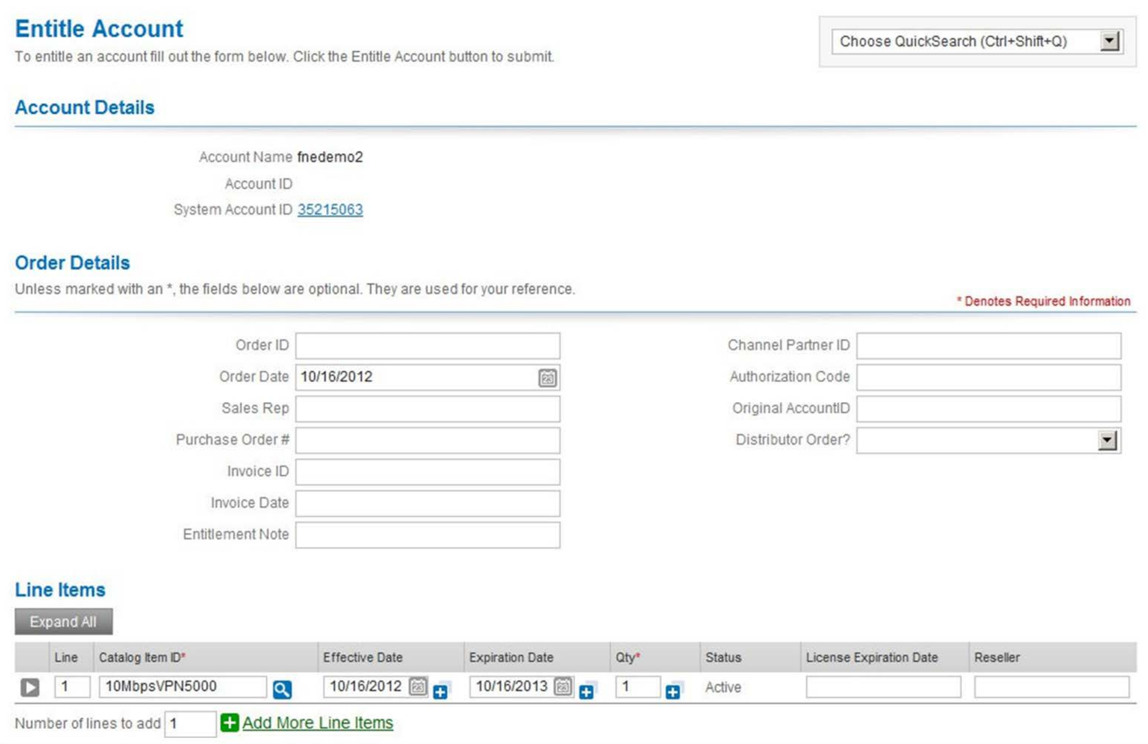


Figure 9-6: Account Search

Task ***To entitle an account:***

1. Select the **Entitle Customers** menu then click **Entitle Account**.
2. Type the account name in the **Account Name** field then click **Search**. Use the account you created in Creating an Account and a Member.
3. In the search results, click the account name. The **Entitle Account** screen appears.



4. In the **Line Items** section, click the **Search** icon next to the **Catalog ID** field. Use the ID for the catalog item you created in Creating and Configuring Add-Ons.
5. Type the name of the catalog item in the **Description** field then click **Search**.
6. Click the Catalog Item ID. The Catalog Item ID appears in the **Line Item** row.
7. Choose whether to send an **Entitlement Notification Email message**:
    - If you want to send an entitlement notification email, choose one or more available members and choose an email template from the **Select Entitlement Email** drop-down menu.

      Note ▪ *If you want to include additional recipients, type their email addresses into the **CC** or **BCC** field.*
    - If you don’t want to send an order notification email, select **Don’t Send** from the **Select Entitlement Email** drop-down menu.
8. Click **Entitle Account**.

Mapping an Add-On to a Device

Use the following steps to map an add-on to the device you added using the Producer Portal.

Note ▪ *You can also map an add-on using an activation ID. See Mapping an Add-On Using an Activation Code for more details.*

Task ***To map an add-on for a device:***

1. Select the **Manage Hosts** menu then click **Search Devices**.
2. In the **Device ID** field, type the device ID for the device to which you want to map the add-on, and then click **Search**.
3. In the search results, click the **Device ID**. The **View Device** screen appears.
4. Select the **Add-Ons** menu then click **Map Add-Ons**.

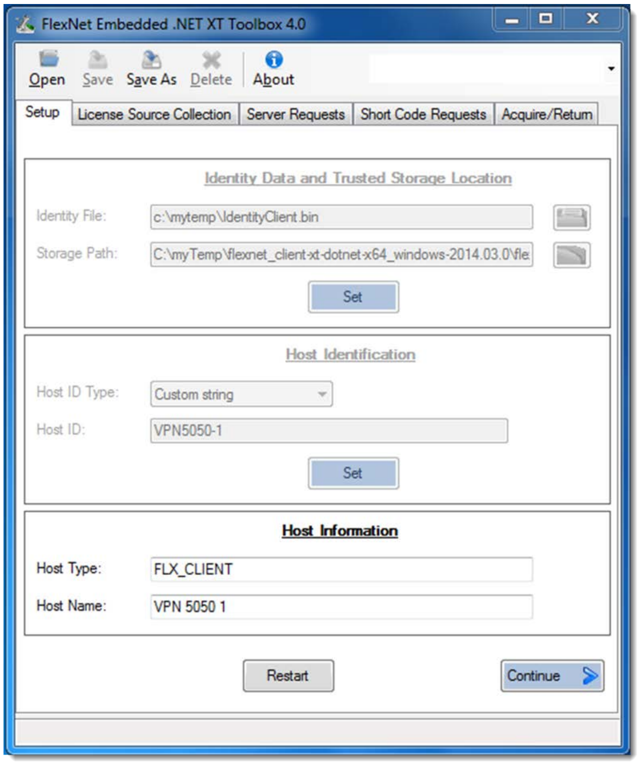
5. Type a number in the **Units to Configure** field. For this example, use **1**.
6. Click **Map Add-Ons**. A message appears indicating the add-on was mapped successfully.

Testing an Add-On Using the .NET Toolbox Device Application

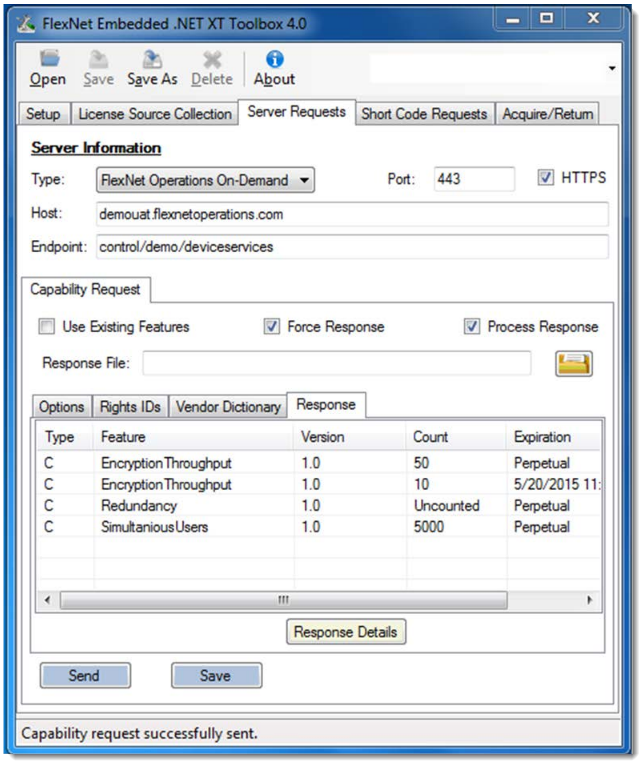
To test device licensing using the .NET Toolbox device application, you must install and configure the .NET Toolbox device application. Use the following steps to test the add-on using the .NET Toolbox device application.

Task ***To test an add-on using the .NET Toolbox device application:***

1. From the Producer Portal, select the **Manage Hosts** menu then click **List Identities**.
2. Click the **Identity Name**. This opens the identity's **View Identity** page.
3. Under **Identity Files**, find **Download Client Identity** and click **Binary File**. Download behavior varies depending on the web browser you are using.
4. Save the binary client identity file (`IdentityClient.bin`) to your machine.
5. Open the **.NET Toolbox** device application from `<installdir>\bin\demo\toolbox\DotNetDemo.exe`. The **Setup** tab appears.



6. Click the folder icon next to the **Identity File** field and browse the location where you saved the client identity `.bin` file. Double-click the `.bin` file. The file path is populated in the **Storage Path** field.
7. Click **Set**. When the identity data is set, the **Host Identification** fields are enabled.
8. For **Host ID Type**, select **Custom string**.
9. For **Host ID**, type the Device ID of the device you created inAdding a Device. For this example, use **`VPN5050-1`**. Click **Set**.
10. Type the device model name in the **Host Type** field. For this example, use the default device model name, **`FLX_CLIENT`**.
11. Type the device alias in the **Host Name** field. For this example, use **`VPN 5050 1`**.
12. Click the **Server Requests** tab.



13. Select **FlexNet Operations On-Demand** from the **Server Type** drop-down menu. The **Host**, **Port** and Endpoint fields are updated.

14. Type <your_site_name>uat.flexnetoperations.com into the Host field.

15. Click the Response tab then click Send. The device details appear, including capabilities included in a base license and any add-on capabilities that have been mapped.

Using the Enterprise Portal

This section includes the following tasks:

- Accessing the FlexNet Operations Enterprise Portal
- Viewing Devices Using the Enterprise Portal

***Note** ▪ The Enterprise Portal interface is often customized and distinctively branded for each producer. As a result, your Enterprise Portal pages may look different from the screen captures in this guide, but the core functionality described here is the same.*

Accessing the FlexNet Operations Enterprise Portal

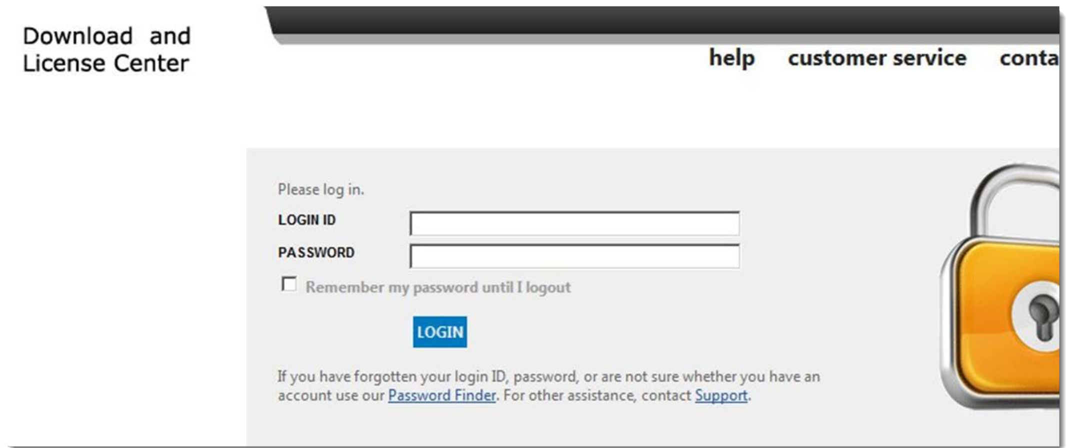
You can validate that the base license and any add-ons you mapped have been successfully created for a device using the FlexNet Operations Enterprise Portal. Use the following steps to access the Enterprise Portal.

Task ***To access the Enterprise Portal:***

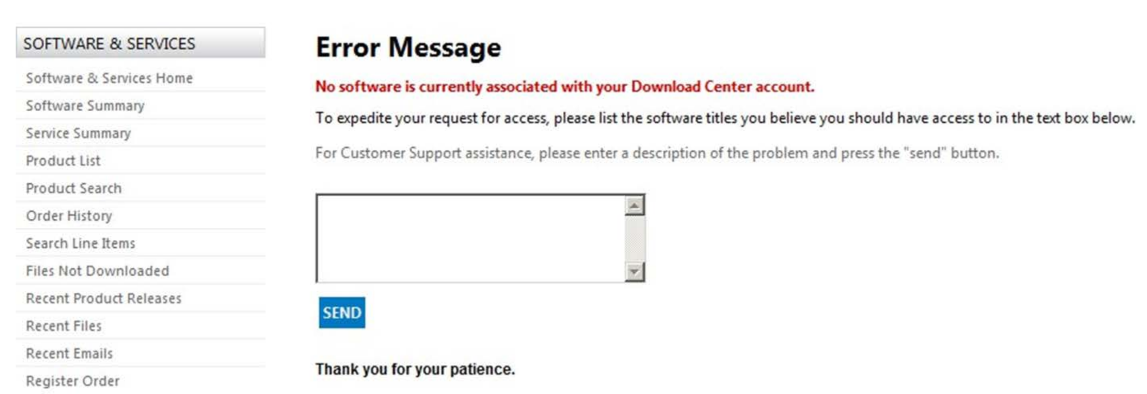
1. Open a web browser and enter the following URL:

   https://<your_site_name>uat.flexnetoperations.com

   Note ▪ *The URL in step 1 is a typical URL for a customer's Enterprise Portal. If you do not know the URL assigned to your company, contact Revenera Support.*



2. If you are associated with more than one account, you are asked to choose which account you want to use. Click the Company Name for the account you want to use. The Enterprise Portal opens.

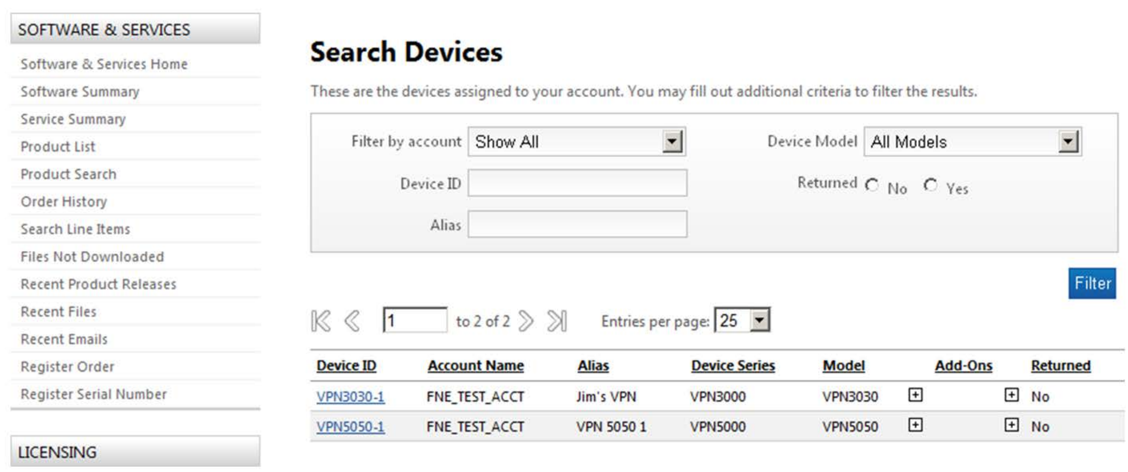


Viewing Devices Using the Enterprise Portal

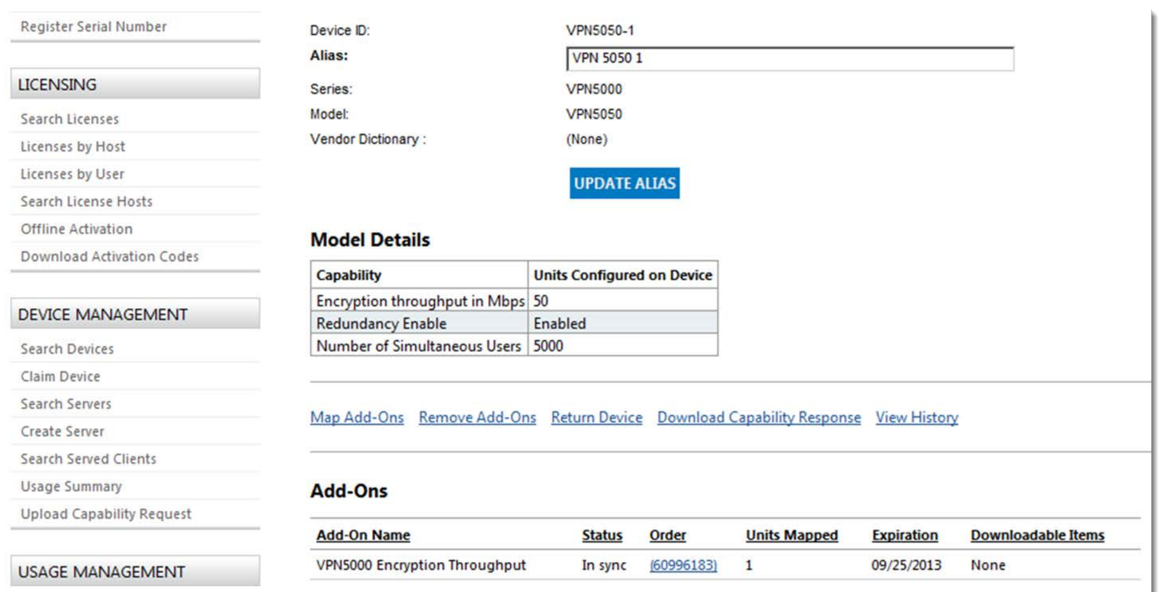
You can validate that the base license and any add-ons you mapped have been successfully created for a device using the FlexNet Operations Enterprise Portal. Use the following steps to view the device you created and verify its licensing.

Task ***To view a device:***

1. From the Enterprise Portal, select **Search Devices** from the **Devices** menu. An unfiltered list of devices appears.



2. Click the **Device ID**. The **View Device** page displays the device details, including the core information that identifies and categorizes the device, vendor dictionary (if any), model and base license details for the device, and all add-ons that have been added to the device after initial purchase.



Managing Devices

The purpose of this section is to walk you through typical tasks your customer might perform while managing devices throughout their lifecycle using the Enterprise Portal.

Table 9-4 ▪ Managing Devices

Section	Description
Viewing Device Details and History	Describes the steps to view device details and history using the Enterprise Portal.
Claiming a Device	Describes the steps to register or claim a device using the Enterprise Portal.
Upgrading Devices	Describes the steps to upgrade a device with additional capabilities or capacities using the Enterprise Portal.
Transferring Licenses	Describes the steps to transfer a license from one device to another using the Enterprise Portal.
Managing Returns and RMA	Describes the steps to manage returns and Return Material Authorization (RMA) using the Enterprise Portal.

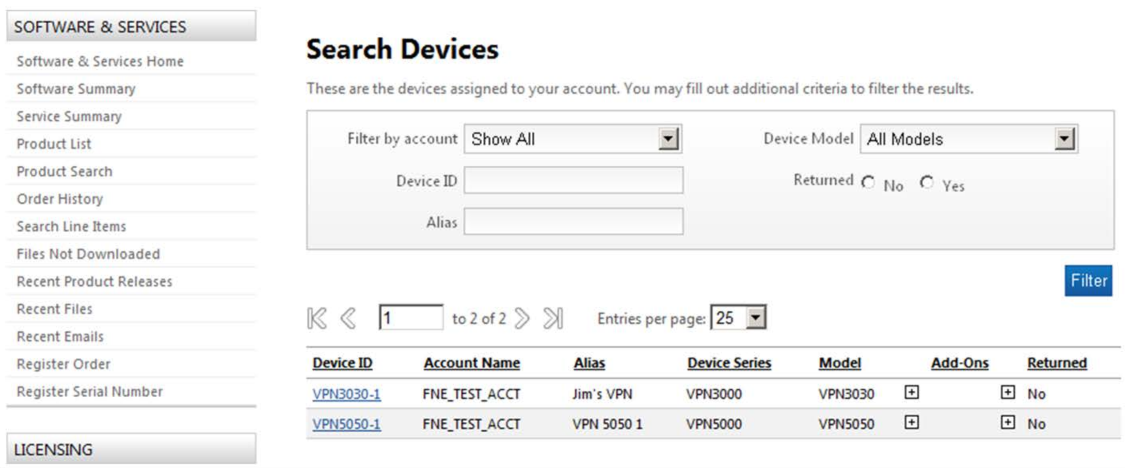
You can also execute all of these tasks on behalf of your customer using the Producer Portal.

Viewing Device Details and History

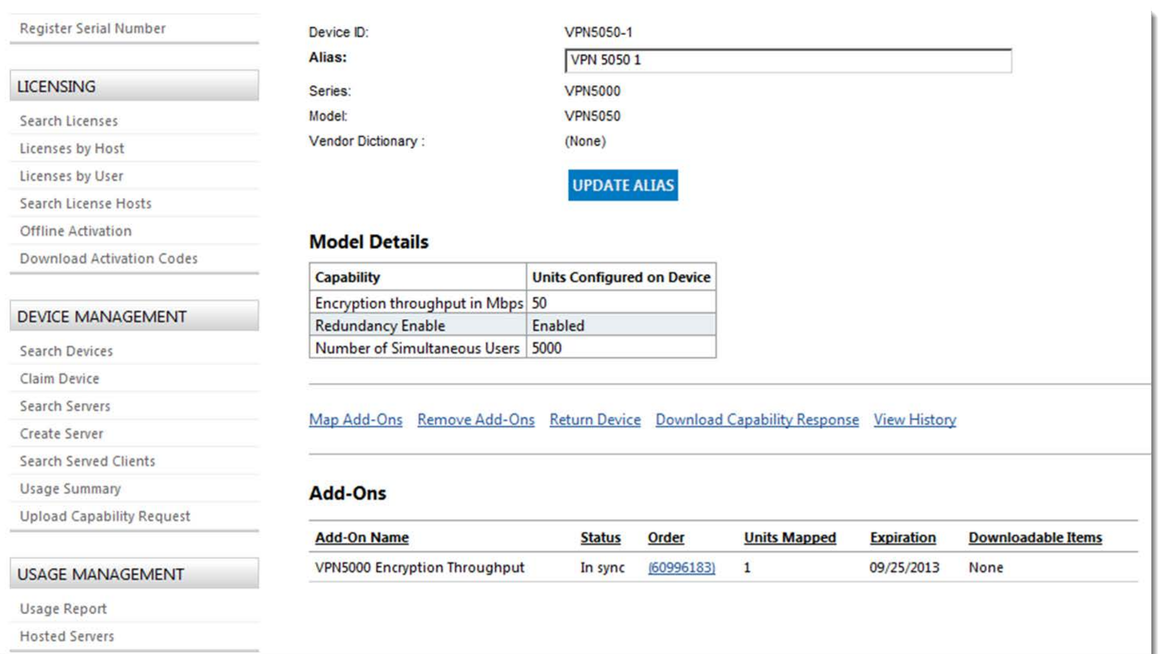
Use the FlexNet Operations Enterprise Portal to view details about a device such as device ID, status, host type, as well as details about any pre-built or add-on licenses. You can also view the history specific to a single device. The device history page lists all the device events including device creation, account changes, and activation requests. Use the following steps to view device details.

Task ***To view device details and history:***

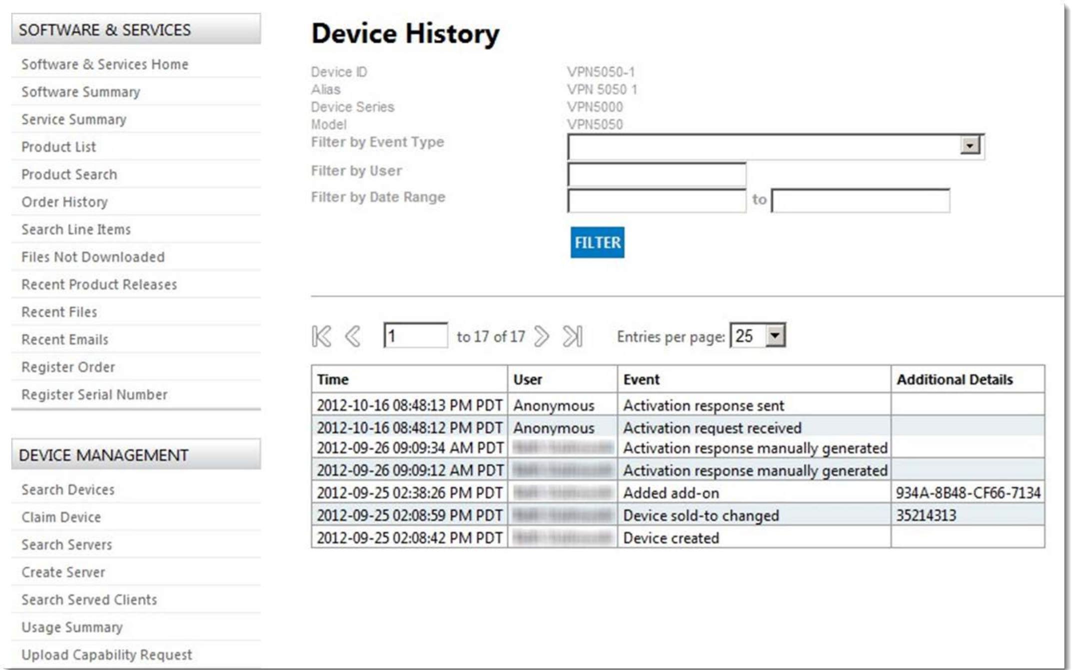
1. From the Enterprise Portal, select **Search Devices** from the **Devices** menu. An unfiltered list of devices appears.



2. Click the **Device ID**. The **View Device** page displays the device details, including the core information that identifies and categorizes the device, vendor dictionary (if any), model and base license details for the device, and all add-ons that have been added to the device after initial purchase.



3. To view the device history, click **View History**.



Time	User	Event	Additional Details
2012-10-16 08:48:13 PM PDT	Anonymous	Activation response sent	
2012-10-16 08:48:12 PM PDT	Anonymous	Activation request received	
2012-09-26 09:09:34 AM PDT		Activation response manually generated	
2012-09-26 09:09:12 AM PDT		Activation response manually generated	
2012-09-25 02:38:26 PM PDT		Added add-on	934A-8B48-CF66-7134
2012-09-25 02:08:59 PM PDT		Device sold-to changed	35214313
2012-09-25 02:08:42 PM PDT		Device created	

Filtering the Device History List

By default, the device history list shows all the device-related activities for a specified device. You can filter the device history list using the following parameters:

- Use the **Event Type** drop-down menu to show a subset of activities based on the type of activity.
- Use the **Date Range Start** and **Date Range End** fields to show activities restricted to a specific time frame.

Claiming a Device

Your customer can register or claim devices using the Enterprise Portal. You can also claim a device without using the Enterprise Portal. See Device Creation for more details. Use the following steps to claim a device using the Enterprise Portal.

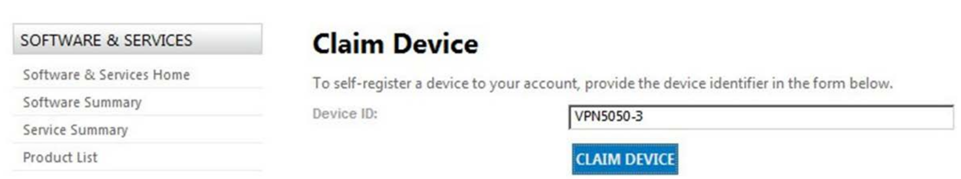


Figure 9-7: Claim Device

Task ***To claim a device:***

1. From the Enterprise Portal, select **Claim Device** from the **Devices** menu.
2. Type the device ID in the **Device ID** field. For example, use **`VPN5050-3`**.

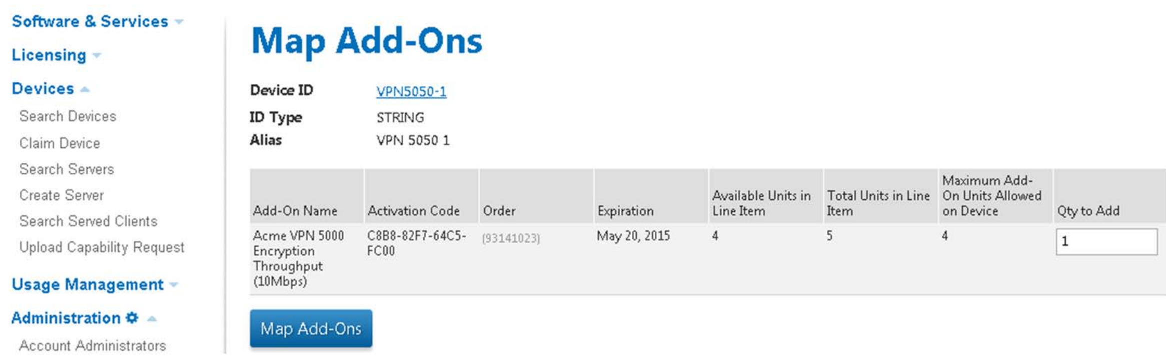
3. Optionally, type a name for the device in the **Alias** field or type additional information in the **Notes** field.
4. Click **Claim Device**.

Upgrading Devices

An upgrade is defined as moving a customer from a specified version of a product to an improved version with new or expanded capabilities. First, in the Producer Portal, create a Catalog Item for the add-on, configure FlexNet licensing for that item, and entitle it to your account. Then, use the following steps to upgrade a device using the Enterprise Portal.

Task ***To upgrade a device***

1. From the Enterprise Portal, select **Search Devices** from the **Devices** menu. An unfiltered list of devices appears.
2. Click the **Device ID**. For this example, use **VPN5050-1**. The device details appear.
3. Click **Map Add-Ons**. The **Map Add-Ons** screen opens.



4. Type **1** in the **Qty to Add** field then click **Map Add-Ons**. A message appears, indicating that the add-on was mapped successfully.
5. Send a capability request using the .NET Toolbox Device Application for the changes to take effect. Refer to Testing the Base License Using the .NET Toolbox Device Application for detailed steps.

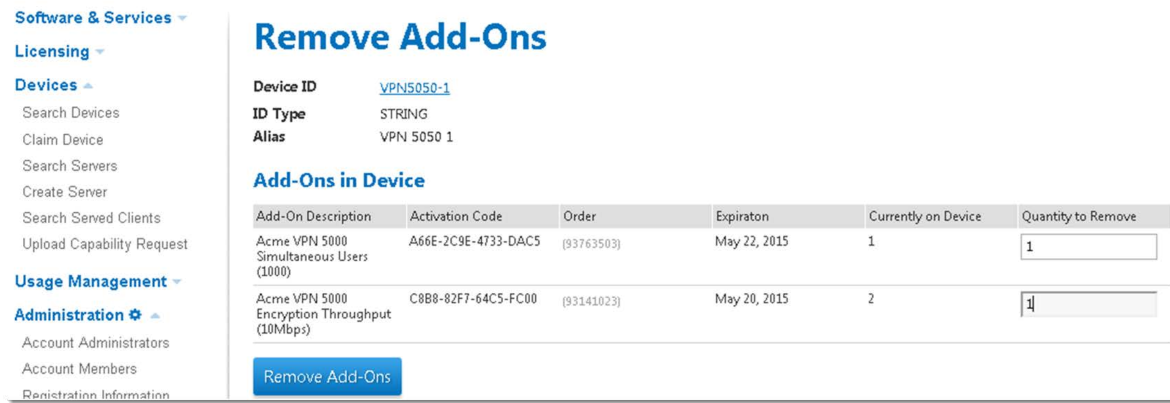
Transferring Licenses

Transferring licenses is defined as the process of moving licenses from one machine to another. Use the following steps to transfer a license.

Task ***To transfer a license:***

1. From the Enterprise Portal, select **Search Devices** from the **Devices** menu. An unfiltered list of devices appears.
2. Click the **Device ID**. The device details appear.

3. Type **1** in the **Quantity to Remove** field for each add-on associated with the device then click **Remove Add-Ons**.



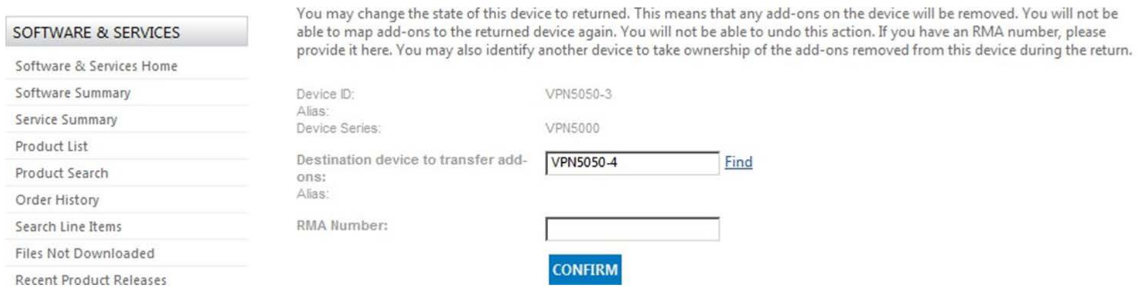
4. Send a capability request using the .NET Toolbox Device Application for the changes to take effect. Refer to Testing the Base License Using the .NET Toolbox Device Application for detailed steps.
5. Create a new device with the same characteristics as the old but use a new Device ID (**VPN5050-2**).
6. Map the add-on capabilities removed from the old device to the new device.
7. Click **Save**. A newly authorized device has been created in FlexNet Operations.
8. Send a capability request using the .NET Toolbox Device Application for the changes to take effect. Refer to Testing the Base License Using the .NET Toolbox Device Application for detailed steps.

Managing Returns and RMA

A customer may need to return a malfunctioning device to a manufacturer or reseller. This process is known as Return Material Authorization (RMA). During the return process, you have the option to move all its licenses to a replacement device. If you do not move a license, the license is returned to the unused pool and you can allocate it later to another device. Once you have determined that a device needs to be returned and a new one replace it, use the following steps to process an RMA.

Task ***To process an RMA:***

1. From the Enterprise Portal, select **Search Devices** from the **Devices** menu. An unfiltered list of devices appears.
2. Click the **Device ID**. The device details appear.
3. Click **Return Device**.



Important *▪ Returning a device is an irrevocable action. It is intended for cases where this device ID will never again need to receive a capability response or license file.*

4. To transfer the license for the device you are returning to another device, type the ID for the existing device in the **Destination Device to transfer add-ons** field. For this example, use `VPN5050-4`.
5. If you have a return authorization material number, type it in the **Return Authorization Material (RMA) Number** field. This is not required.
6. Click **Confirm**. The device details appear showing the device as returned.

Managing Servers

This section provides information on managing FlexNet Embedded (FNE) license servers, such as adding a server using the FlexNet Operations Enterprise Portal, viewing served clients, usage summary, and license server request history.

This section includes the following topics.

Table 9-5 ▪ Managing Servers

Topic	Description
About FlexNet Embedded License Servers	Discusses the use of FlexNet Embedded license servers and their role in the FlexNet Embedded architecture.
Adding a FlexNet Embedded Server	Provides instructions for adding a license server in the Enterprise Portal.
Mapping an Add-On to a Server	Explains how to map add-ons to a server in the Enterprise Portal.
Viewing Served Clients	Shows how to view the devices (served clients) served by the license server.
Activating an Unregistered FlexNet Embedded License Server	Explains how to activate unregistered FlexNet Embedded license servers.

Table 9-5 ▪ Managing Servers

Topic	Description
Using Server Sync to Send License Transaction Data to the Back Office	Discusses the use of the server sync process to provide visibility into server and client license transactions in the FlexNet Operations back office.

About FlexNet Embedded License Servers

FlexNet Embedded license servers communicate with FlexNet Operations to manage devices and features for a collection of served clients. If you are using a FlexNet Embedded server, your client devices connect with this server rather than connecting directly to FlexNet Operations.

The FlexNet Embedded license server provides functionality for serving and monitoring a counted pool of licenses for intelligent device or software clients. The server application is designed to administer licenses, enforce usage count, and provide served-license status information in conjunction with client code that incorporates FlexNet Embedded.

FlexNet Embedded license servers can be hosted in the Revenera cloud (Cloud License Service) or locally deployed into your customer's enterprise. The hosting approach you choose for your FlexNet Embedded license servers depends on your organization's deployment needs. Figure 4-1 shows the FlexNet Embedded Server's role in the FlexNet Embedded architecture. For more details, consult the FlexNet Embedded License Server User Guide.

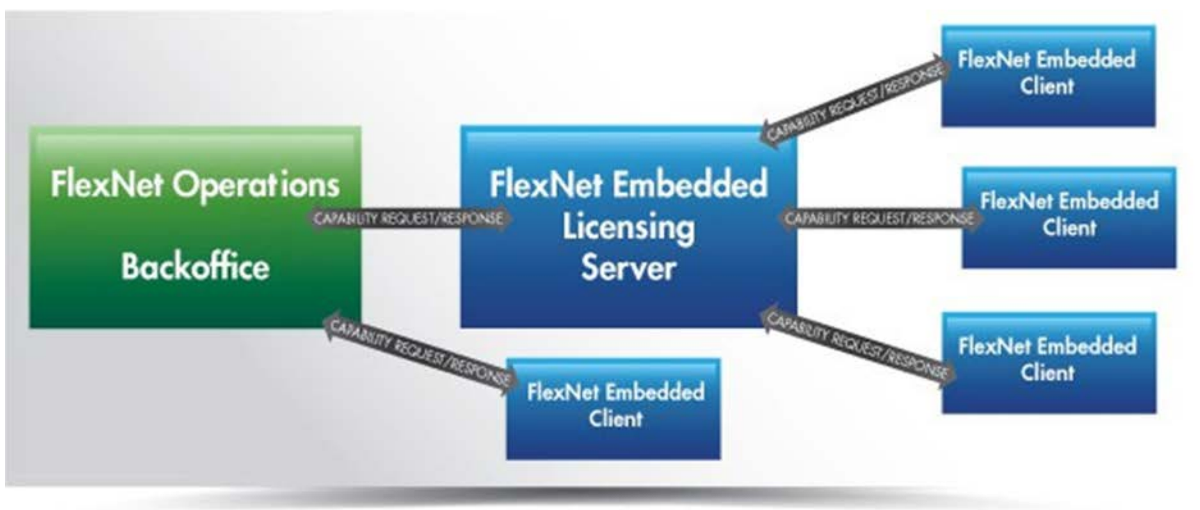


Figure 9-8: FlexNet Embedded License Server's Role in FlexNet Embedded Architecture

Adding a FlexNet Embedded Server

You can add a FlexNet Embedded server using the Producer Portal or the Enterprise Portal. For this example, use the following steps to create a server using the Enterprise Portal.

Figure 9-9: Create Server

Task ***To add a FlexNet Embedded server:***

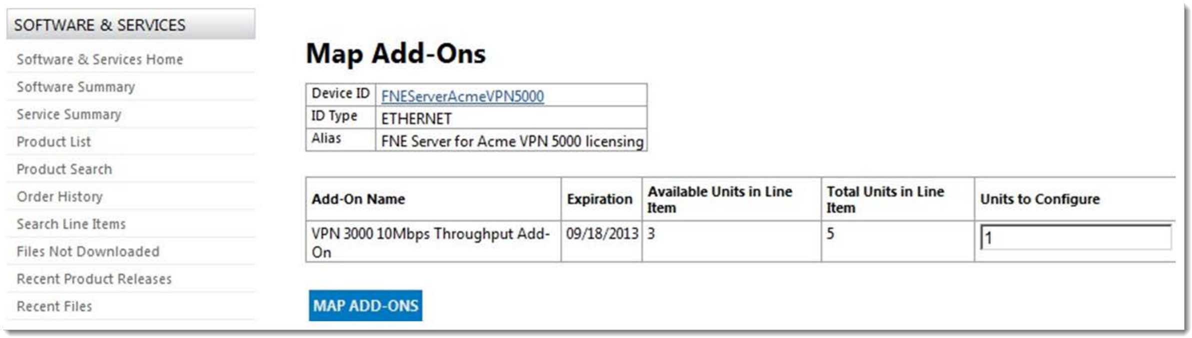
1. From the Enterprise Portal, select **Create Server** from the **Devices** menu.
2. Type a unique ID for the license server in the **Device ID** field. For this example, use the MAC address of the machine that is being used as the License Server.
3. Select an ID type from the **ID Type** drop-down menu. For this example, leave **ETHERNET** selected.
4. Select a host type from the **Type** drop-down menu. For this example, leave the **default** selected.
5. Type a description for the server in the **Alias** field. For this example, use `FNE Server for Acme VPN 5000`.
6. Click **Create Server**.

Mapping an Add-On to a Server

You map add-ons to a server the same way you map add-ons directly to a device. Once the server activates with FlexNet Operations, it then has those capabilities which can be used to serve local devices. Use the following steps to map an add-on for the server you created.

Task ***To map an add-on for a server:***

1. From the Enterprise Portal, select **Search Servers** from the **Devices** menu. An unfiltered list of license servers appears.
2. Click the **License Server ID**. The server details appear.
3. Click **Map Add-Ons**.



4. Type a number in the Units to **Configure** field. For this example, use **1**.

5. Click **Map Add-Ons**. A message appears indicating the add-on was mapped successfully.

6. Send a capability request using the .NET Toolbox Device Application for the changes to take effect. Refer to Testing the Base License Using the .NET Toolbox Device Application for detailed steps.

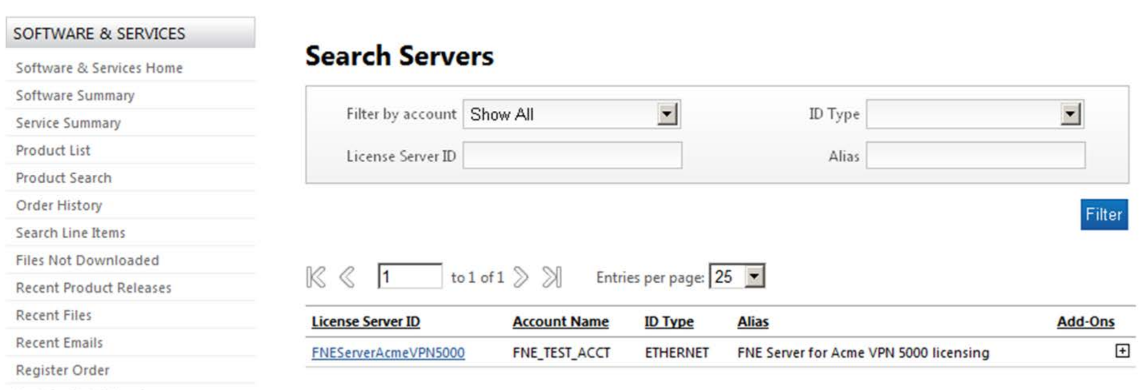
Viewing Served Clients

Served clients refer to FlexNet Embedded devices that are managed by a FlexNet Embedded Server. In FlexNet Operations, served client devices are read-only entities. Use the following steps to view the clients served by a specific FlexNet Embedded server using the Enterprise Portal.

***Note** ▪ For FlexNet Embedded license server users who deploy license servers into their customers' enterprise, the served client data is only available when the server is syncing with the FlexNet Operations back office. See Using Server Sync to Send License Transaction Data to the Back Office. (License servers hosted in the Revenera cloud automatically sync with the back office.)*

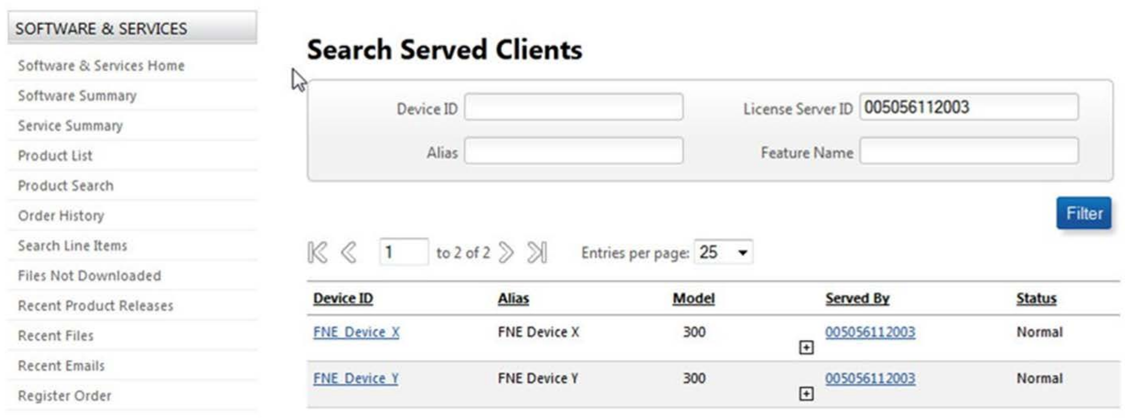
Task ***To view clients served by a license server:***

1. From the Enterprise Portal, select **Search Servers** from the **Devices** menu. An unfiltered list of license servers appears.



Note ▪ *If you search for the server using the* ***Alias*** *field, note that the alias is not a unique ID. The same alias can be used for multiple servers.*

2. Click the **License Server ID** to view server details.
3. Click **View Served Clients**. The page lists the devices that are managed by the server you selected.



Activating an Unregistered FlexNet Embedded License Server

You can add a FlexNet Embedded license server in the Producer Portal or in the Enterprise Portal, but you can also create an unregistered server by submitting an activation request to the FlexNet Operations back office. The request must include an activation code and host information. When it receives such a request, the back office creates the license server and maps the activation code to that server with the requested quantity.

The back office processes activation requests from unregistered servers by using the default server host type (typically, FLX_SERVER). FlexNet Operations ties that server host type to each license server created through this process—thereby defining the server's identity.

Note ▪ *The pre-defined server host type, FLX_SERVER, is associated, by default, with the first identity a producer creates.*

Using Server Sync to Send License Transaction Data to the Back Office

As transactions occur between FlexNet Embedded servers and FlexNet Embedded devices, the FlexNet Embedded server incrementally updates the data it stores about the status and activations of its devices. When syncing is enabled, the server syncs with FlexNet Operations. The transmittal of sync data to FlexNet Operations is configured by device manufacturers when configuring the FlexNet Embedded license server.

With each sync, you gain valuable visibility—in the FlexNet Operations back office—into how your customers are using the served client devices and what features they are using on them.

***Note** ▪ You can view the sync messages by viewing the device's history. The history of a FlexNet Embedded server shows sync messages related to all its served clients while the history of a served client shows only the messages specific to that client device*

Advanced Topics

This section provides information on advanced topics.

Table 9-6 ▪ Advanced Topics

Section	Description
Device Series and Device Model Concepts	Illustrates the role of device series and device models in FlexNet Operations.
Creating Device Series and Device Models	Describes the steps to create a device series and a device model.
Mapping an Add-On Using an Activation Code	Describes the steps to map an add-on using an activation code and the .NET Toolbox device application.
Your Endpoint	Explains the endpoint value to use with FlexNet Embedded devices that communicate with the FlexNet Operations back office.
Device Creation	Describes the ways a device can be created.
Offline Activation	Describes the steps to use offline activation for a device that is not connected to the Internet.
FlexNet Embedded License Models	Describes the steps to create a customized FlexNet Embedded license model.
Digital Signature Algorithm	Describes the digital signature concept and which algorithms are supported.
Counted and Uncounted Capabilities	Describes the difference between counted and uncounted capabilities.
License Formats	Defines the two ways to save license data and compares the three options to configure license format when creating a device model.
Viewing Device and License Server Request History	Shows how to view the request history in the Producer Portal
Vendor Dictionary	Describes the vendor dictionary and the steps for how to view it.

Device Series and Device Model Concepts

To understand the basic concepts of using FlexNet Embedded licensing in the cloud-hosted edition of FlexNet Operations, use the following example use case where Acme Networks, Inc. is a manufacturer that has created a series of VPN devices that includes three device models. The procedures to follow in Quick Start Example reference this example to explain how to create these device series and device models and then map capabilities to customers.

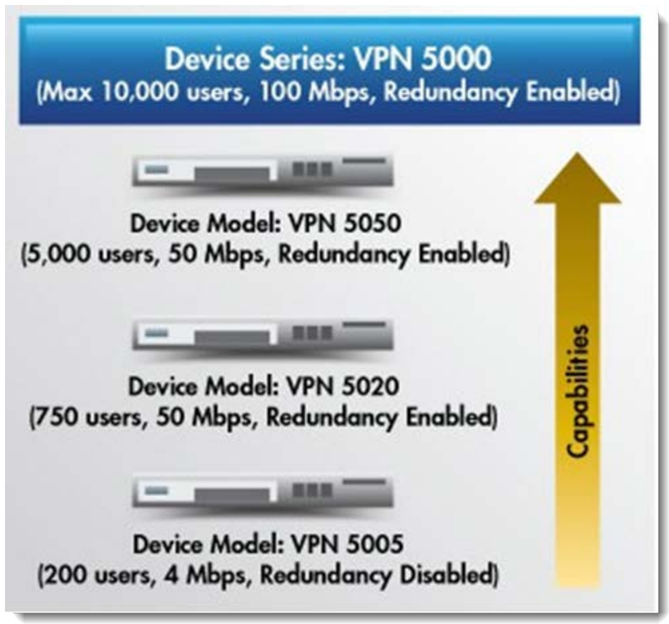


Figure 9-10: Device Series and Device Models

- **Device Series**—A collection of device models that are physically identical but upgradable in the field through license changes and add-on capabilities. In the Device Series and Device Models figure, VPN 5000 is an example of a device series.

  A device series sets the maximum limits for device capabilities and capacities. In this example, all device models within the VPN 5000 device series can have

  - No more than 10,000 simultaneous users
  - No more than 100 Mbps of throughput
  - Redundancy enabled or disabled

- **Device Model**—A base model for a device that manufacturers use to create a base license. A base license defines a set of capabilities within the maximum limits for the device series. The device model with that particular base license represents a purchasable configuration for a device. In In the Device Series and Device Models figure, VPN 5005, VPN 5020, and VPN 5050 are all device models and part of the VPN 5000 device series. They each define and represent a different set of capabilities.

  In this example, the VPN 5050 device model includes:

  - 5,000 simultaneous users
  - 50 Mbps of throughput

    - Redundancy Enabled

- **Add-On**—A catalog item you create to represent a license change that grants additional capabilities or capacity for a device. In this example, an add-on might include 1,000 simultaneous users and 10 Mbps of throughput.

Creating Device Series and Device Models

This section describes the tasks to create a Device Series and Device Model using the Producer Portal.

- Adding a Device Series
- Adding a Device Model

These tasks include some example suggestions based on the example presented in Device Series and Device Model Concepts.

Adding a Device Series

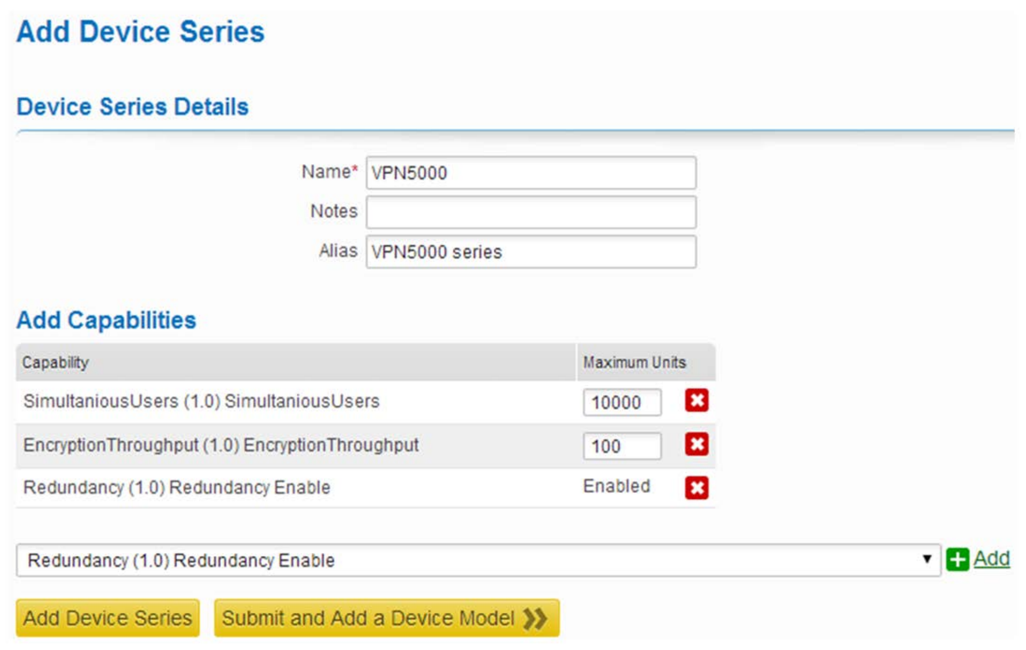
A device series is a collection of device models that are physically identical but upgradable in the field through license changes and add-on capabilities. A device series sets the maximum limits for device capabilities and capacities.

***Tip ▪** A pre-defined device series, `FLX_CLIENT_SERIES`, is provided for all producers. Those producers who do not require the additional complexity of defining multiple device series and device models can leverage the `FLX_CLIENT_SERIES` instead of creating their own device series.*

Use the following steps to add a device series using the capabilities you created.

Task ***To add a device series:***

1. Select the **Manage Hosts** menu then click **Add Device Series**.



2. Type a unique identifier for the device series in the **Name** field. For this example, use **`VPN5000`**.
3. Type a description in the **Alias** field. For this example, use **`VPN5000 series`**.
4. Under **Add Capabilities**, click the arrow next to the drop-down menu then select each capability you created then click **Add** (**SimultaneousUsers**, **EncryptionThroughput**, **Redundancy**).
5. Type the maximum units for each counted capability for the Device Series. For this example, type **`10,000`** for **SimultaneousUsers**, and type **`100`** for **EncryptionThroughput**.

   Note ▪ *The maximum unit for uncounted capabilities, like the **Redundancy** capability, defaults to **Enabled**.*

6. Click **Submit and Add a Device Model**.

Adding a Device Model

A device model is a base model for a device that producers use to create a base license. A base license defines a set of capabilities within the maximum limits for the device series. The device model with that particular base license represents a purchasable configuration for a device. If a model has a certain capability, that capability can be increased to what is defined as the maximum in the series.

***Tip** ▪ A pre-defined device model, `FLX_CLIENT`, is provided for all producers. Those producers who do not require the additional complexity of defining multiple device series and device models can leverage the `FLX_CLIENT` instead of creating their own device models.*

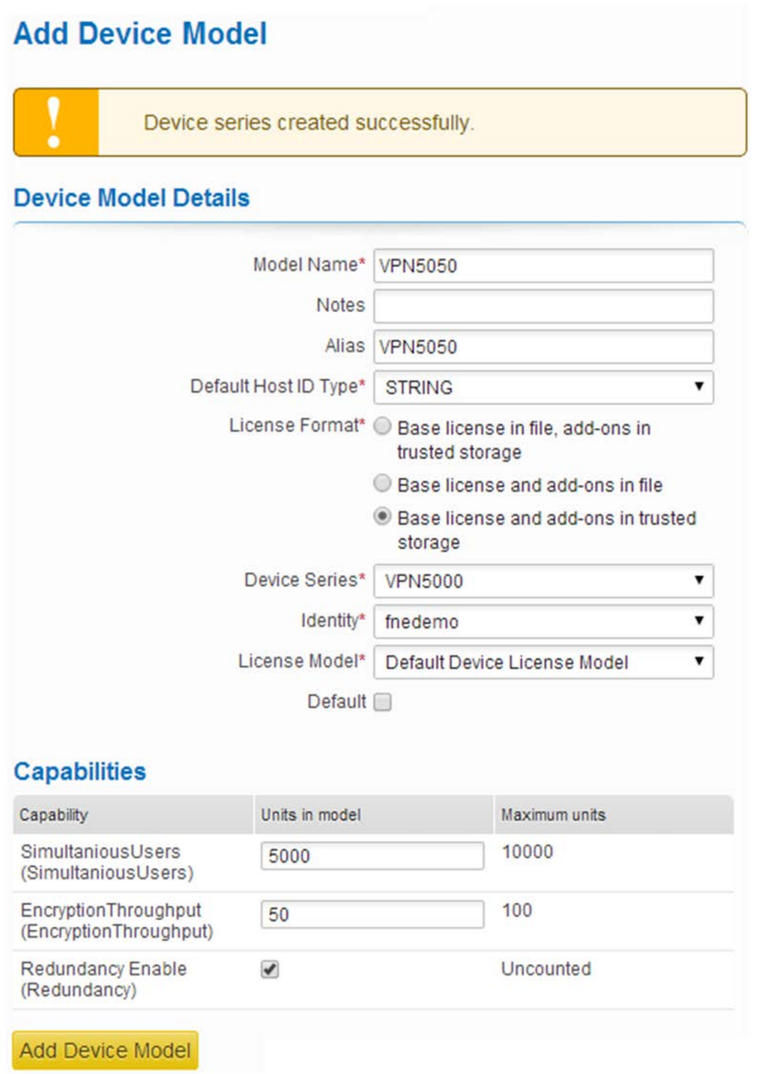


Figure 9-11: Add Device Model - VPN5050

***Note** ▪ The following steps assume you have just completed the steps in Adding a Device Series and clicked **Submit and Add a Device Model** to open the **Add Device Model** page. If not, you must first open the **Add Device Model** page by clicking **Manage Hosts > Add Device Model**.*

Task ***To add a device model:***

1. Type a unique identifier for the device model in the **Model Name** field. For this example, use `VPN5050`.
2. Type a short description of the device model in the **Alias** field. For this example, use `VPN5050`.
3. Select a **Default Host ID Type**. For this example, use **STRING**.
4. Select a license format using the **License Format** radio buttons. For this example, choose **Base license and add-ons in trusted storage**.

   Note *▪ For more information about license formats, see License Formats.*

5. Select a device series from the **Device Series** drop-down menu. For this example, select **VPN5000**.
6. Select a publisher from the **Publisher Identity** drop-down menu. Use the publisher you created in Setting Up a Publisher.
7. Select **Default Device License Model** from the **License Model** drop-down menu.

   Note *▪ The license model you choose here is used as the license model for all devices of this model. For more information on creating and using license models, see FlexNet Embedded License Models.*

8. Under **Capabilities**, configure the capabilities associated with this device model. For this example, type `5000` for **Number of Simultaneous Users**, `50` for **Encryption Throughput**, and select the **Redundancy** checkbox.

   Note *▪ For this example, leave the **Default** checkbox unchecked. Checking **Default** would make this device model the default device model for all devices created without specifying a device model.*

   Important *▪ Once you add a device model, most device model settings become fixed. For existing device models, you can alter only the **Notes** and **Alias** fields and the **Default** checkbox.*

9. Click **Add Device Model**.

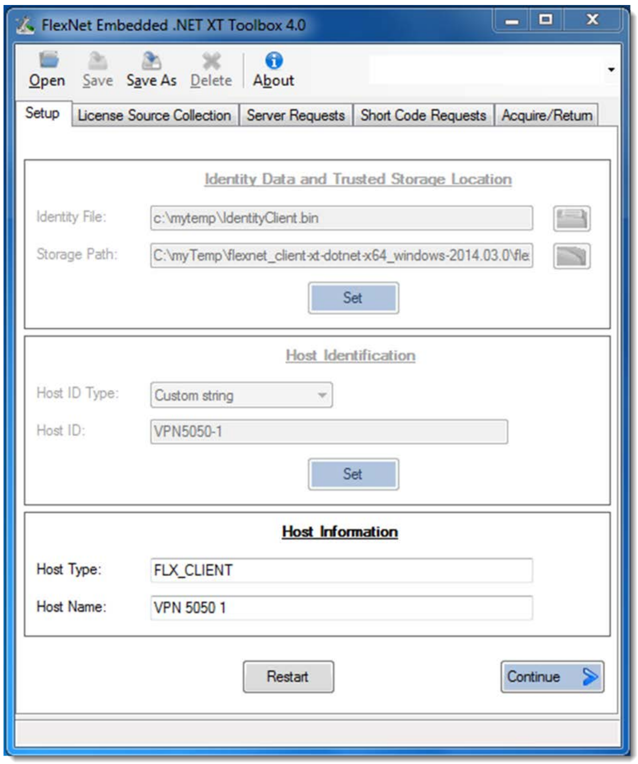
Mapping an Add-On Using an Activation Code

Using the .NET Toolbox device application, you can map an add-on with an activation code. Use the following steps to map an add-on with an activation code.

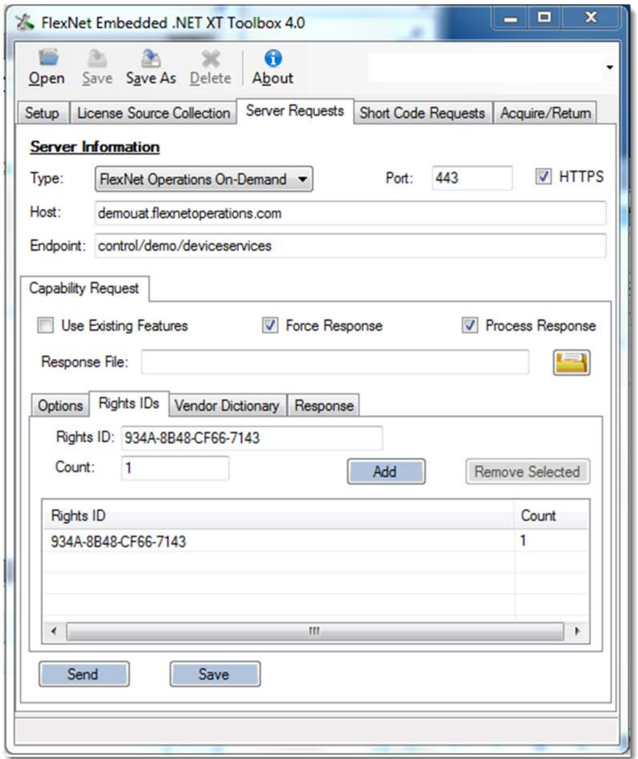
Task ***To map an add-on using an activation code:***

1. From the Producer Portal, select the **Manage Hosts** menu then click **List Identities**.
2. Click the **Identity Name**. This opens the identity's **View Identity** page.

3. Under **Identity Files**, find **Download Client Identity** and click **Binary File**. Download behavior varies depending on the web browser you are using.
4. Save the binary client identity file (`IdentityClient.bin`) to your machine.
5. Open the .NET Toolbox device application from `<installdir>\bin\demo\toolbox\DotNetDemo.exe`. The **Setup** tab appears.



6. Click the folder icon next to the **Identity File** field and browse the location where you saved the client identity `.bin` file. Double-click the `.bin` file. The file path is populated in the **Storage Path** field.
7. Click **Set**. When the identity data is set, the **Host Identification** fields are enabled.
8. For **Host ID Type**, select **Custom string**.
9. For **Host ID**, type the Device ID of the device you created in Adding a Device. For this example, use **`VPN5050-1`**. Click **Set**.
10. Type the device model name in the **Host Type** field. For this example, use the default device model name, **`FLX_CLIENT`**.
11. Type the device alias in the **Host Name** field. For this example, use **`VPN 5050 1`**.
12. Click the **Server Requests** tab.



13. Select **FlexNet Operations On-Demand** from the **Server Type** drop-down menu. The **Host**, **Port** and **Endpoint** fields are updated.
14. Type **<your_site_name>uat.flexnetoperations.com** into the **Host** field.
15. Type the activation code for a particular add-on in the **Rights IDs** field and type the number of units in the **Count** field.

   ***Note** ▪ This example shows 934A-8B48-CF66-7134 for the activation code and 1 for the count. This is an example only. You need to type the unique activation code for the add-on you are mapping.*

16. Click **Add**. The activation code appears in the **Rights ID** column.
17. Click **Send** to send the request.

Your Endpoint

When you configure your FlexNet Embedded devices and servers, you must set the endpoint through which its communication with the FlexNet Operations back office will take place.

This endpoint is part of your FlexNet Operations Enterprise Portal, and the endpoint's address may differ depending on your deployment model. FlexNet Embedded devices can communicate directly with the FlexNet Operations back office or they can communicate with a FlexNet Embedded server. That server can be hosted in Revenera's Cloud License Service or deployed locally into your customer's enterprises, and a local license server can communicate with the back office as well.

In the examples in this guide, we have used the `demo` Enterprise Portal endpoint:

demouat.flexnetoperations.com/control/demo/deviceservices

In this case, the partner name, demo, is a key part of the address that distinguishes your portal from other producers.

When you create your own devices, you must use the endpoint specific to your organization. Your specific endpoint will follow the structures shown below, substituting your partner code and specifying an instance ID as necessary:

Table 9-7 ▪ Endpoint Examples

Structure	Endpoint Examples
Device Communicating Directly With the FlexNet Operations Back Office	`https://<partner_name>.compliance.flexnetoperations.com/deviceservices/` `https://demo.compliance.flexnetoperations.com/deviceservices` ***Note ▪*** *In this example, the partner name is demo.*
Local License Server Communicating With the FlexNet Operations Back Office	`https://<partner_name>.compliance.flexnetoperations.com/deviceservices/` `https://demo.compliance.flexnetoperations.com/deviceservices` ***Note ▪*** *In this example, the partner name is demo.* The address that client devices use to communicate with a local license server depends on how the server was deployed. See the *FlexNet Embedded License Server User Guide* for more information.
Device Communicating With a Cloud-Based License Server	`https://<partner_name>.compliance.flexnetoperations.com/instances/<instance_ID>` `https://demo.compliance.flexnetoperations.com/instances/1N84CJQKFDB0` ***Note ▪*** *In this example, the partner name is demo and the license server ID (instance ID) is 1N84CJQKFDB0.* Cloud-based license servers do not require any additional configuration to communicate with the back office.

Device Creation

There are multiple ways to create a device. This section covers two typical scenarios for how a device is created.

Producer Creates Device

A producer creates a device using the Producer Portal. After creating the device using the Producer Portal, an owner can start using the device with one of the following methods:

- The customer claims the device through the Enterprise Portal using the Device ID.

- The producer assigns a device owner through the Producer Portal after which the customer is able to access this device using their Enterprise Portal without claiming it.

Customer Claims an Unknown Device

A producer has made arrangements with Revenera to allow a process where a customer can claim an unknown device—a device that was not created using the Producer Portal. An unknown device can be claimed with one of the following methods:

- A device makes a capability request to the FlexNet Operations back office. This request contains both the device ID and the device model name.
- The customer claims the device through the Enterprise Portal using the Device ID. In this case, the assumption is that the device model can be derived from the device ID.

Offline Activation

Some devices may follow an offline activation model in which the device generates a binary license request file for an add-on license that can be manually uploaded on the FlexNet Operations Enterprise Portal.

FlexNet Operations processes the request file to generate a license appropriate for the request. If the license request is made for an existing device, FlexNet Operations generates a regenerative license. This means that each new response will contain the complete intended state of capabilities for the client and that calling the FlexNet Embedded library to process that response will overwrite any previous state which might have existed. Each capability response completely replaces any previous responses.

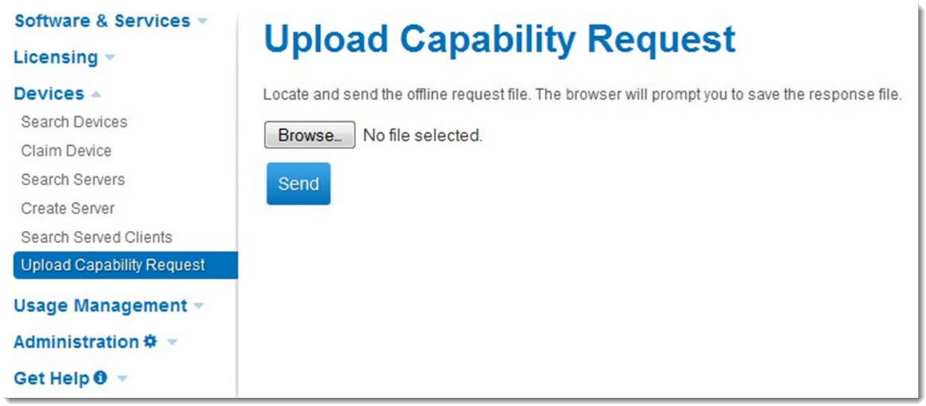
If the request is made for a new device, FlexNet Operations enters the device into the system, adds the corresponding add-on, and generates a license for it.

Task ***To upload a capability request file:***

1. Generate a capability request file on the offline device and save to external storage.

   Note *▪ For more information on generating a capability request for offline devices, see the user guide for your FlexNet Embedded toolkit.*

2. From the Enterprise Portal, select **Upload Capability Request** from the **Devices** menu.



3. Click **Browse**.
4. Navigate to the capability request file where you saved it then click **Open**.
5. Click **Send**. You are prompted to download the activation response.
6. Save it and load it into your application to activate.

FlexNet Embedded License Models

A FlexNet Embedded license model assigns default parameters for either a base license that is used to create a device model or add-on capabilities that are used to entitle an account. A license model specifies sources for the values of feature record properties in generated licenses.

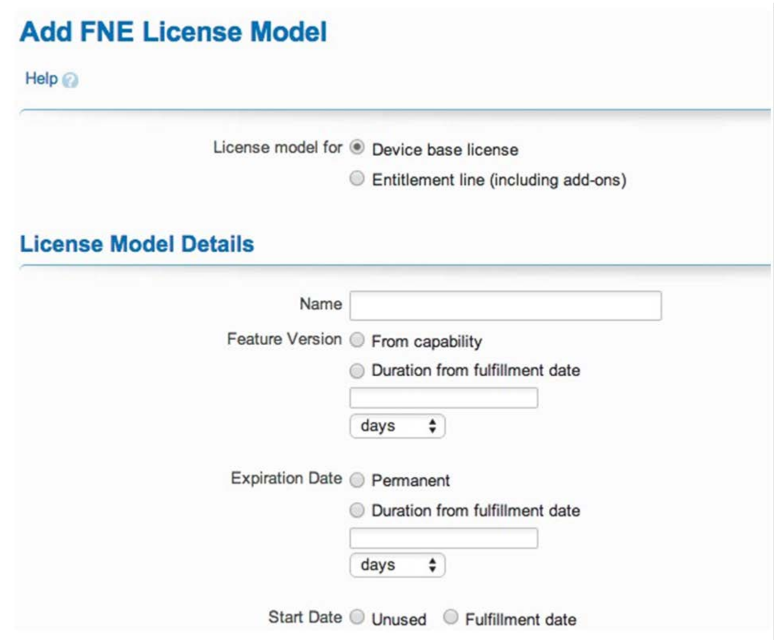
Linking multiple license models to a single catalog item is allowed. If multiple license models are linked to a catalog item it will always be required to specify, at the time an order line is created, which of those multiple license models applies to the order line. If only a single license model is linked, then it is used by default.

Note ▪ *The ability to create or edit license models requires the right permissions. Only users with the **Product Management (PDCT)** permission can create license models. Only users with the **Manage FlexNet Secret Keys (KEYS)** permission can edit existing license models.*

Use the following steps to add an FlexNet Embedded license model.

Task ***To add a FlexNet Embedded license model:***

1. From the Producer Portal, select the **Manage Hosts** menu then click **Add FNE License Model**.



2. Select one of the following **License model for** radio buttons, depending on the type of license model you want to create:

    - **Device base license**—Use this when creating a base license for a device model.
    - **Entitlement line (including add-ons)**—Use this when creating an add-on for account entitlement.

3. Type a short description for the license model in the **Name** field.

4. Make selections for the following parameters:

    - **Feature Version**
    - **Expiration Date**
    - **Start Date**
    - **Issuer**
    - **Notice**
    - **Vendor String**
    - **Serial Number**
    - **Virtualization**

*Note ▪ Select **Unused** for parameters that are not used in your license model. Select **Replacement String** and type a string replacement for parameters that you want to refer to a variable. For example, type `${account.name}`. For more information about string replacements, see the help text.*

5. Click **Create Order Line License Model** or **Device License Model**, depending on which license model type you selected.

Digital Signature Algorithm

When you create an identity, you select a digital signature algorithm, which will create a digital signature designed to prevent forgery and tampering on the device. FlexNet Operations and FlexNet Embedded support the following digital signature algorithms:

- **License Key (LK)**—48-bit proprietary algorithm
- **Tamper-Resistant Licenses (TRL)**—163-bit, or 239-bit elliptic curve encryption
- **RSA**—512-bit, 1024-bit, or 2048-bit RSA encryption

Counted and Uncounted Capabilities

When you create a capability, you configure it as one of two types: counted or uncounted. This configuration indicates whether the capability is limited to a specific number of units or is a capability that is turned on or off.

A feature can be counted, meaning that acquisitions of that feature may succeed or fail based on a count to be acquired, or uncounted, meaning that acquisitions of arbitrary count of that feature are allowed as long as the feature is present.

- **Counted**—This capability is limited to a specific number of units. The count is specified during the entitlement process.
- **Uncounted**—There is no limit to the number of times this capability can be deployed. It is a capability that is either enabled or disabled.

License Formats

FlexNet Embedded supports different ways of representing license rights on a system. A producer can create customized device models by combining the two different ways to store licenses: Binary Licenses and Trusted Storage.

Figure 9-12: License Formats

The following are the two ways you can store licenses:

- **Binary License**—Licenses can be stored as an array of bytes, either imported by license-enabled code during execution or compiled into the executable code. This type of license is typically node-locked to a particular device, and may contain an expiration date.
- **Trusted Storage**—License rights can be fulfilled or upgraded by a back office server, either online or offline. This type of license right is stored in trusted storage, a secure location bound to a particular device, and which supports verifiable returns to the back office server and subsequent transfer to a different device.

When you create a device model in FlexNet Operations, you can select one of three license formats:

- **Base license in file, add-ons in trusted storage**—The base license is stored to a binary file, and add-on capabilities are stored in trusted storage.
- **Base license and add-ons in file**—The base license and add-on capabilities are stored in a binary file.
- **Base license and add-ons in trusted storage**—The base license and add-on capabilities are stored in trusted storage.

These license formats are options on the **Add Device Model** screen:

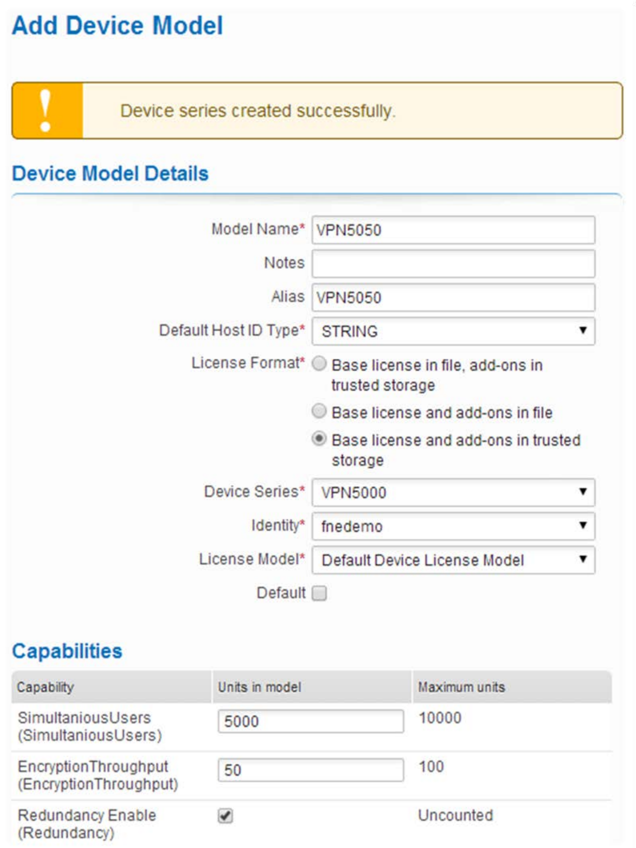


Figure 9-13: Adding a Device Model - License Formats

Viewing Device and License Server Request History

Use the following steps to view the history of all device and license server requests using the Producer Portal.

Viewing License Server Request History

To view license server request history, perform the following steps.

Task ***To view license server request history:***

From the Producer Portal, select the **Manage Hosts** menu then click **Request History**. The **FlexNet Embedded Request History** page displays the complete record of requests.

- The **Request History** page shows all requests but the results appear in a pages. You can set the number of requests per page to **25** (default), **50**, **100**, or **200**.
- Request history results can be filtered by date or by ID. By default, the Request History page shows requests for all dates and request IDs.

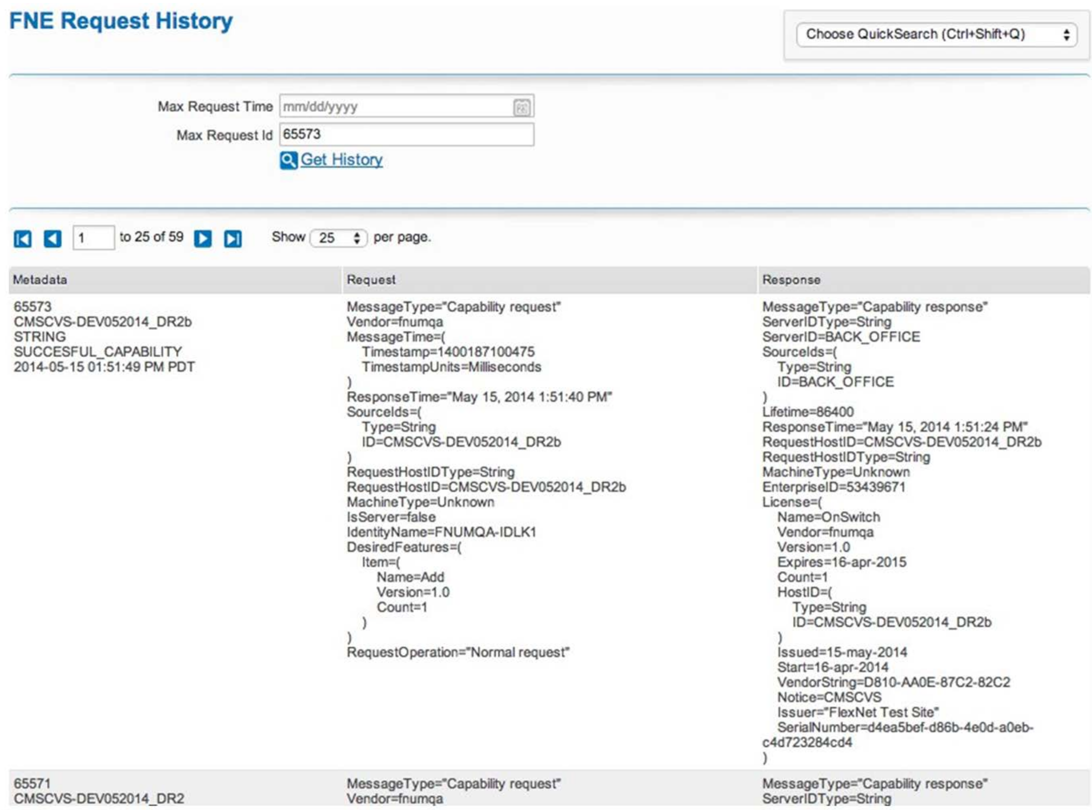
Filtering Request History Results

To filter the Request History results, perform the following steps.

Task ***To filter the Request History results:***

1. On the **Request History** page, enter any date or ID values you want to use to filter the request history results.
    - **Max Request Time**—Determines how recent the requests include in the request history results will be. No requests that occurred after the specified date are included in the results.
    - **Max Request ID**—Limits the request history results according to the request ID. No requests with a request ID number higher than the specified request ID are included in the results. (Only numbers are possible in the **Max Request ID** field, and wildcards are not permitted.)
2. Click **Get History**.

    The Producer Portal refreshes the Request History page to show only the requests that match the filters.



Vendor Dictionary

The FlexNet Embedded capability request allows a device to communicate a vendor dictionary. This is a collection of name value parameters that are defined by the producer, such as GPS coordinates, time zone, and region. The vendor dictionary provides an interface for an implementer to send custom data in addition to the FlexNet Embedded–specific data from the device to server or vice versa. This data can be used in license-enabled code and the back office server to send information back and forth for any manufacturer-defined purposes, as needed.

Task ***To view a vendor dictionary for a device:***

On the **View Device** page, select **View Vendor Dictionary** from the **View** menu.

Permissions

To perform specific processes using the Producer Portal, you must ensure you have the necessary permissions. The following table provides a list of permissions required for each process.

Table 9-8 ▪ Permissions Required for FlexNet Operations Processes

Process	Permissions
List Publishers	Manage FlexNet Secret Keys (KEYS)
Add Publisher	Manage FlexNet Secret Keys (KEYS)
List Publisher Identities	Manage FlexNet Secret Keys (KEYS)
View Publisher Identity	Manage FlexNet Secret Keys (KEYS)
Add Publisher Identity	Manage FlexNet Secret Keys (KEYS)
Download Identity File	Manage FlexNet Secret Keys (KEYS)
List Capabilities	Basic View Access (PTNR)
Add Capability	Product Management (PDCT)

Table 9-8 ▪ Permissions Required for FlexNet Operations Processes

Process	Permissions
Update Capability	Product Management (PDCT)
List Device Series	Basic View Access (PTNR)
View Device Series	Basic View Access (PTNR)
Add Device Series	Product Management (PDCT)
Edit Device Series	Product Management (PDCT)
Search Device Models	Basic View Access (PTNR)
View Device Model	Basic View Access (PTNR)
Add Device Model	Product Management (PDCT)
Edit Device Model	Product Management (PDCT)
Add Device	Device Management (DVCM)
Search Devices	Basic View Access (PTNR)
View Device	Basic View Access (PTNR)
View Device History	Basic View Access (PTNR)
Edit Device	Device Management (DVCM)
Assign Device Owner	Device Management (DVCM)
Return Device	Device Management (DVCM)
Obsolete Device	Device Management (DVCM)
Move Device	Device Management (DVCM)
Generate License File	Device Management (DVCM)
Download License File	Basic View Access (PTNR)
View (Print) License File	Basic View Access (PTNR)
Generate Capability Response	Device Management (DVCM)
Upload Capability Request	Device Management (DVCM)
Download Response	Basic View Access (PTNR)

Table 9-8 ▪ Permissions Required for FlexNet Operations Processes

Process	Permissions
View (Print) Response	Basic View Access (PTNR)
Configure Add-On	Product Management (PDCT)
Map Add-Ons	Device Management (DVCM)
Remove Add-Ons	Device Management (DVCM)
Add License Model	Product Management (PDCT)
Edit License Model	Manage FlexNet Secret Keys (KEYS)
List License Models	Basic View Access (PTNR)
View License Model	Basic View Access (PTNR)
Add Server	Device Management (DVCM)
Search Servers	Basic View Access (PTNR)
View Server	Basic View Access (PTNR)
View Server History	Basic View Access (PTNR)
Edit Server	Device Management (DVCM)
Update Server Owner	Device Management (DVCM)
Map Add-Ons	Device Management (DVCM)
Remove Add-Ons	Device Management (DVCM)
Obsolete Server	Device Management (DVCM)
Move Server	Device Management (DVCM)
Generate Capability Response	Device Management (DVCM)
Upload Capability Request	Device Management (DVCM)
Download Response	Basic View Access (PTNR)
View (Print) Response	Basic View Access (PTNR)
List Server Host Type	Basic View Access (PTNR)
Add Server Host Type	Device Management (DVCM)

Table 9-8 ▪ Permissions Required for FlexNet Operations Processes

Process	Permissions
View Server Host Type	Device Management (DVCM)
Edit Server Host Type	Device Management (DVCM)

10

Usage Search

You can use **Usage Search**, which is opened by selecting **Track Usage > Usage Search**, to find the usage and drill down to various statistics and graphs.

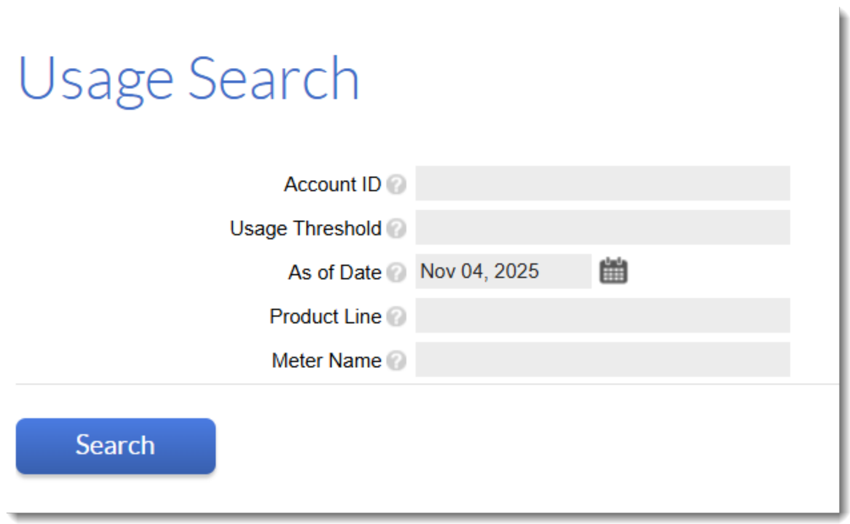


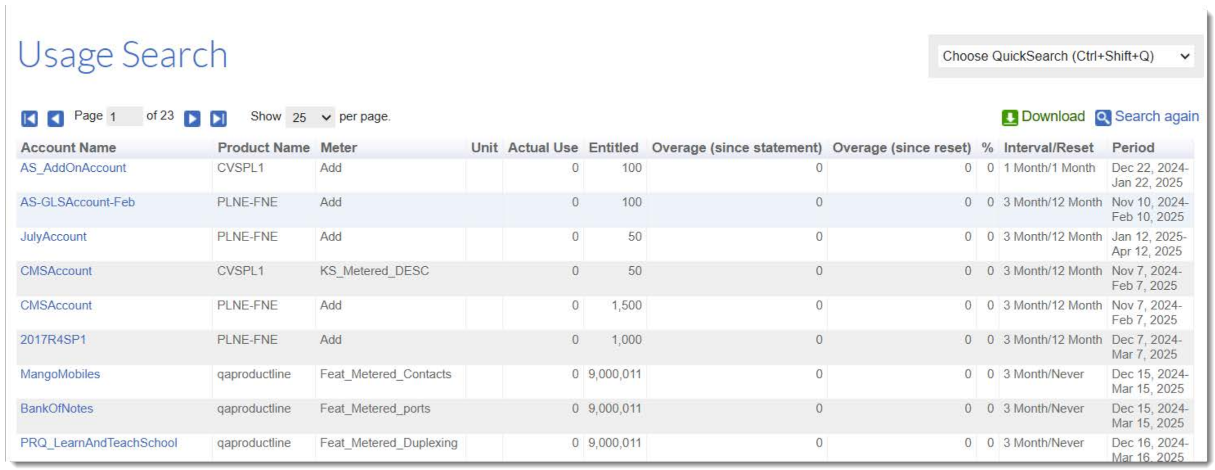
Figure 10-1: Usage Search Panel

You can search by:

- **Account ID**—The **Account ID** from the customer account.
- **Usage Threshold**—Minimum usage percentage (number between 1 and 100).
- **As of Date**—The date limit for usage reports. Reports that occur after the specified **As of Date** value are excluded from the search results.
- **Product Line**—The product line for which you want to see usage.
- **Meter Name**—The name of the meter (typically feature name) for which you want to see usage.

__Note__ ▪ You cannot leave the __As of Date__ field empty, but the other fields can be left blank.

After filling in the search field and clicking **Search**, results are displayed on the **Usage Search** page:



Account Name	Product Name	Meter	Unit	Actual Use	Entitled	Overage (since statement)	Overage (since reset)	%	Interval/Reset	Period
AS_AddOnAccount	CVSPL1	Add		0	100	0	0	0	1 Month/1 Month	Dec 22, 2024-Jan 22, 2025
AS-GLSAccount-Feb	PLNE-FNE	Add		0	100	0	0	0	3 Month/12 Month	Nov 10, 2024-Feb 10, 2025
JulyAccount	PLNE-FNE	Add		0	50	0	0	0	3 Month/12 Month	Jan 12, 2025-Apr 12, 2025
CMSAccount	CVSPL1	KS_Metered_DESC		0	50	0	0	0	3 Month/12 Month	Nov 7, 2024-Feb 7, 2025
CMSAccount	PLNE-FNE	Add		0	1,500	0	0	0	3 Month/12 Month	Nov 7, 2024-Feb 7, 2025
2017R4SP1	PLNE-FNE	Add		0	1,000	0	0	0	3 Month/12 Month	Dec 7, 2024-Mar 7, 2025
MangoMobiles	qaproductline	Feat_Metered_Contacts		0	9,000,011	0	0	0	3 Month/Never	Dec 15, 2024-Mar 15, 2025
BankOfNotes	qaproductline	Feat_Metered_ports		0	9,000,011	0	0	0	3 Month/Never	Dec 15, 2024-Mar 15, 2025
PRQ_LearnAndTeachSchool	qaproductline	Feat_Metered_Duplexing		0	9,000,011	0	0	0	3 Month/Never	Dec 16, 2024-Mar 16, 2025

Figure 10-2: Usage Search Page

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User Defined Fields (UDFs)

User Defined Fields (UDFs) are additional customized fields that may be added to expand the FlexNet Operations LLM service. They can be displayed to End Users through your FlexNet Operations LLM site or simply be used for reporting purposes. UDFs can be set at the following levels: Account, Member, Entitlement, Order Line, Catalog Item, Product, and File. The purpose of this document is to provide some examples of how UDFs have been used by our Customers to-date, which are described in the following sections:

- File Sorting and Filtering on Download Page (File Level UDFs)
- Additional Site Navigation (File Level UDFs)
- Additional File Display Option (File Level UDFs)
- Keywords (Product Level UDFs)
- Documentation Only Members (Member Level UDFs & File Level UDFs)
- Contract Number (Entitlement Level UDFs)
- Geographic Location Indicator (Account Level UDF)

Please contact your Account Manager / Project Manager if you have any questions or if you are interested setting up UDFs. Please note that adding UDFs and/or changing your FlexNet Operations LLM service (as described below) could possibly incur professional services fees.

File Sorting and Filtering on Download Page (File Level UDFs)

When Customers have a large number of Files associated to a Product, the Download Page can become cumbersome for the end user. To assist in locating Files, the Customer can create any number of File level UDFs that can be used to filter what is displayed on the Download Page. The end user will be able to select from a list of potential values for these fields, one value per field, and filter the Files displayed on the Download Page by what they have selected (this approach is sometimes also known as parametric search). In addition, the value for each of the newly added fields will be displayed in new columns in the File information section of the Download Page, and all columns on the Download Page will be sortable by clicking on the column header, or clicking again to reverse sort order. Scenario: End users could locate Files with a critical priority for the Windows platform (where priority is a File level UDF with possible values of critical, high, standard and where platform is a File level UDF with possible values of Windows, Solaris, Linux, etc.).

Additional Site Navigation (File Level UDFs)

When Customers have Products that they entitle to end-users that contain more Files than may apply to each individual end user, they may wish to add additional pages of navigation between the Product Page and the Download Page. For example, if a single Product contains Files for many different OS platforms and database platforms, the end user may only wish to see Files that apply to Windows 2000 and Oracle. To do this, the Customer may create any number of File level UDFs and add one layer of navigation between the Product and Download Pages for each of those File UDFs.

Additional File Display Option (File Level UDFs)

Customers may wish to have different File types displayed on different pages. For example, a File level UDF could be used to distinguish between software and documentation. The end users would be able to view these documentation and software Files on separate page views, with a toggle to view Files of the other type.

Keywords (Product Level UDFs)

Customers may wish to include additional information for end users to be able to search for Products on the FlexNet Operations LLM service. Product level UDFs could be used to allow inclusion of multiple Keywords and the search indexes could be updated to include these Keywords.

Documentation Only Members (Member Level UDFs & File Level UDFs)

Customers may wish to prevent certain end users from viewing particular Files. A File level UDF could be used to distinguish between software and documentation and a Member level UDF could be used to distinguish which end users can view documentation only Files.

Contract Number (Entitlement Level UDFs)

Customers may wish to include additional references for an Entitlement. An Entitlement level UDF can be used to represent a contract number between the Customer and the Customer’s Accounts.

Geographic Location Indicator (Account Level UDF)

Customers may wish to include additional information about their Accounts. An Account level UDF can be used to represent the geographic location of the Account and be used for reporting purposes to view regional activity.

12

FlexNet Operations LLM Support Process

Revenera supports all issues related to the FlexNet Operations LLM service. Revenera attempts to provide vendor-neutral support - that is, the Member requesting support is not aware that the support is being provided by a third party entity, rather than the Customer. Revenera encourages collaboration with the Customer's support group to facilitate effective transition of incidents to the appropriate point of resolution and to expedite issue closure. This document is a high level summary of the Revenera FlexNet Operations LLM support process.

In the case that a section in this document does not apply to you, please consult your contract for your specific information.

Accessing Support

Members of FlexNet Operations LLM are provided an intuitive user interface, FAQs and a User's Manual as self-help tools to address questions they may have about the service. In the event that the user cannot resolve their question or issue, information is provided in the FAQs and User's Manual on how to access a support organization—the Customer's support group, or Revenera's support group. Additionally, if the user experiences an error situation within the service, they are always provided the option to contact support about the issue. Typically, the following text is presented to the Member as part of the User's Manual:

Contacting [Customer] for Support

For [Customer] product-related questions, contact [Customer's Support Organization] by email [support@customer.com] or call [customer 800 phone number] (from within the U.S.) or [customer 800 phone number] (from outside the U.S.).

For help downloading or questions regarding your [FlexNet Operations LLM Service Name] account, contact [customer]@flexnetoperations.com or call 1-888-715-4687 (from within the U.S.) or 1-408-642-3965 (from outside of the U.S.).

For urgent download issues outside of U.S. business hours, you can page the on-call support representative by calling the phone numbers listed above.

Support Commitments

Revenera Support will provide a combination of email-based and telephone-based support on issues related to the FlexNet Operations LLM site up to and including product download.

Customers and FlexNet Operations LLM Members may contact Revenera Support by email or telephone at any time, 24x7x365. Revenera Support staff will be available for live-answer telephone and email support between the hours of 6:00 PM Sunday – 6:00 PM Friday Pacific Time on U.S. business days.

Revenera will provide telephone responses to after-hours pager notifications for critical issues on weekends and U.S. holidays. Revenera will respond to the FlexNet Operations LLM Member page within 30 minutes of receipt and will begin research and resolution within 30 minutes of discussing the incident with the Member.

Non-urgent voicemail will be returned during the day or starting at 6:00 PM Pacific Time the day before the next business day if the voicemail is from the weekend or holiday. Email will be returned within 24 business hours of receipt. Support will be provided in English.

FlexNet Operations LLM Members contacting Revenera regarding technical support for Customer Products will be referred to the appropriate Customer's technical support organization, thereby transferring resolution ownership.

Phone Routing

Inbound telephone calls are received on a dedicated Revenera Support line (with an additional toll-free number available for all US callers). During business hours, all support calls to these numbers will be automatically directed to the Revenera Download Support representative who is "next-available" on the phone system. If all representatives are busy assisting other callers, or if call is placed outside of business hours, the caller will be directed to a dedicated Download Support voice mailbox, where they can leave a message. The voice message also contains instructions on how to page the on-call Download Support representative.

***Note** ▪ Any incident involving a suspected security breach or outage of the FlexNet Operations LLM Application should be reported immediately, using the Revenera Customer Support line or pager, as needed.*

Email Routing

Email is directed to the Support group through a Customer-specific email alias listed on multiple pages on the co-branded web sites (example: [customer]@flexnetoperations.com). All Support email correspondence for the Customer's FlexNet Operations LLM site will be done through the Customer-specific email alias, and will contain instructions specific to the inquiry.

Incident Tracking

All telephone calls and emails will be entered into the Support Incident Tracker system and assigned to a support representative. This support representative will be responsible for tracking and reporting on each incident until resolved. All events are documented in the Resolution field of the Incident Tracker and the field is updated as status changes.

For a list and descriptions of incident types tracked by the Revenera Support group, see the end of this document.

Internal Escalation Process

Incidents that are not resolved during the initial contact with a Revenera Support representative will be escalated to internal technical experts based upon severity level. The support staff will manage escalated incidents. If a FlexNet Operations LLM Member is dissatisfied with the response from their initial support staff, they may contact a Support team leader. If the Support team leader is unable to resolve the issue, the Member may contact the Senior Manager of Client Services, and ultimately the Director responsible for the Revenera Download Support group.

Escalations Between Revenera and Customer Support Groups

The Revenera Support group will take responsibility for resolving incidents directly related to the FlexNet Operations LLM service itself. Incidents regarding product technical information, product entitlement, or Member accounts will be directed to the Customer's appropriate support group. Similarly, incidents that the Customers' support group(s) receives related to the FlexNet Operations LLM service are typically forwarded to Revenera Support for resolution.

Tools for Your Customer Support Organization

Your Customer Support organization has the ability to use FlexNet Operations LLM Producer Portal to log in, see product hierarchy, and access clickable links in the same way that your End User (member) can.

The following displays the FlexNet Operations LLM Producer Portal interface:

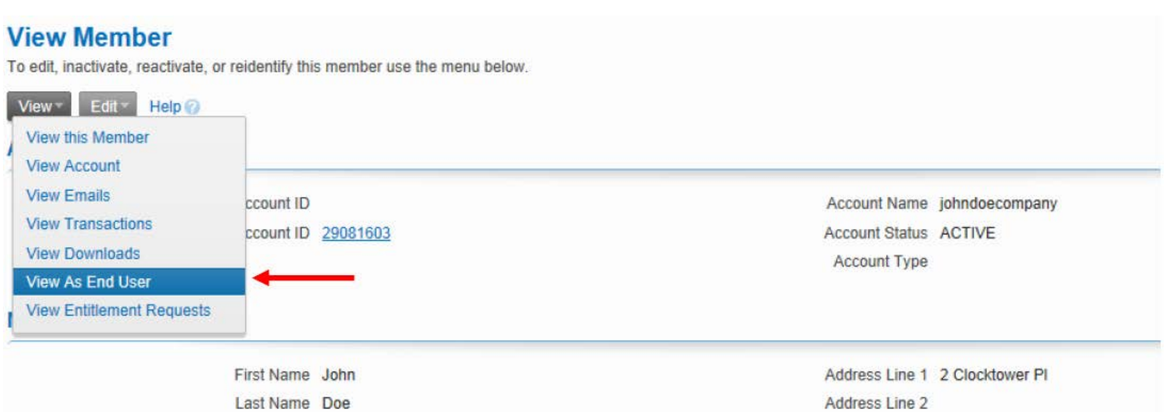

Figure 12-1: View As End User Option

Once you select the **View as End User** menu option, a new window opens with a read only view of the End User's FlexNet Operations LLM account. In this window, you can see everything that the member can see, such as Product List, Files, any applicable License Information, and left navigation bar options, etc. This view allows you to bypass an End User License Agreement to see the product list page. The license agreement remains in place for the member. The following displays the user interface wrapper:

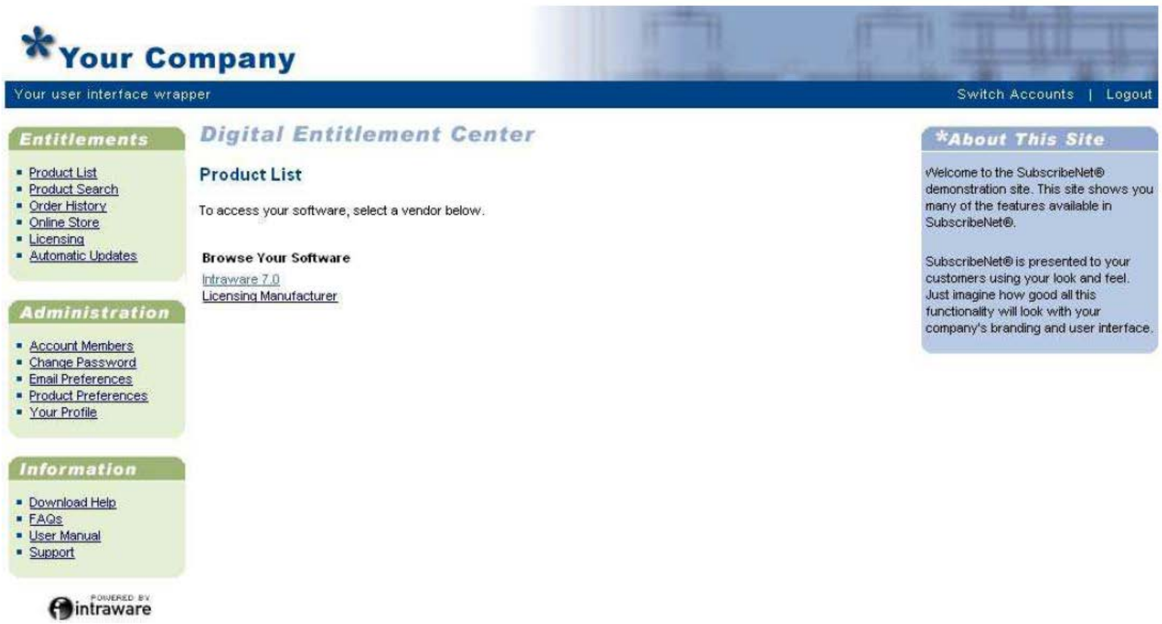

Figure 12-2: End User Portal Example

***Note** • This is a permission-based view.*

Support Reports

All support incidents recorded by Revenera Support for a Customer can be viewed by the Customer by requesting a report from the Customer Account Manager that will be generated from Revenera's Customer Support Center. Data in the reports is live and always up to date.

Revenera Support Incident Types

This table lists out the incident types used by the Revenera Support group to classify all support incidents received by phone or email. A brief description of how each incident type is used is also included.

Table 12-1 ▪ Type of Incident

Incident Type	Brief Description
Add Members to Account	• Add/replace member on existing account requests. • Service access requests and account for company already in system. • Add other person(s) to email notification mailing list.
Com/Ques on Site, Srvc or Nav	
Connection Prob/SSO Issues	• Site down. • Member network issue. • SSL issue (member can not connect to secure site). • Single sign on issues.
Download Accelerator Issue	Accelerator not installing/working.
Download Difficulties	• Download not completing/too slow. • FTP access restricted by member's firewall. • Help with advanced download options.
Edit Profile	Edit member profile (company name, address, name, and phone numbers).
Email Address Change	Change/correct member email address.
Email Pref Change / Notify Ques	• Unsubscribe from update notifications (turn emails off). • Not receiving update notifications (turn emails back on).
Enhancement Request	Request change on the SNet site.
Entitlement Question	• New account request (incl. request for service access and account for company is NOT already in system). • Product/version missing from account. • Order inquiry (e.g. what was order for, when was it placed, etc.) • Entitlement date change/inquiry. • Limited downloads issues/inquires.

Table 12-1 ▪ Type of Incident

Incident Type	Brief Description
Export Compliance Issue	• Restricted entity/person blocked from downloading. • Temporary/Restrictive export classification for product blocking downloads. • Missing/Wrong export classification for product blocking downloads.
License Generation Issue	• Does not understand how to generate license. • Cannot find license file once generated. • Wants to return/regenerate license and cannot.
Media Order Question	Physical media requests/order inquires.
Merge Accounts	• Merge multiple accounts for same company. • Move member added to wrong account.
New Account Request	Add account to service.
Non-SNet Related Issue	• Inquiries not related to service or products on service (e.g. company information queries, etc.). • Inquiry that should have been answered by customer's support and was misrouted to us.
Operator Error	
Password	• Has not received/has forgotten password (incl. request for service access and member is already set up with access). • Password change/re-set requests/inquiries.
Privacy Inquires	Privacy statement inquiries.
Privilege Change	• Add/Remove download privileges and administrative privileges. • Restrict access to software inquires/requests.
Product Information Query	• Product availability/release schedule. • Product functionality/compatibility questions.
Re / Deactivate Acct or Member	Reactivate/Deactivate member(s) on account (or entire account).
Registration Issue	For registration only sites.

Table 12-1 ▪ Type of Incident

Incident Type	Brief Description
Request Copy of Invoice/Order	Wants a printed copy of invoice or order.
Reset Download Limit	Requests for more downloads after reaching their download limit.
Sales Question	Wants to place order/renew license agreement.
Serial Number	• Serial/License/Installation Key/Code/Number requests. • Can locate serial number on site. • Have not been sent serial number/re-send request. • Does not know which serial number to use/serial number does not work. • Serial number missing from site.
Site Problem/File Issues	• Product hierarchy/image set up issues. • Site problems (e.g. web site bugs, broken functionality, unexpected errors, etc.)
FlexNet Operations On-Demand Producer Portal	• Issues/Inquiries pertaining to the FlexNet Operations On-Demand Producer Portal site. • Entitlement process issues (incl. issues with automated transaction feed).
FlexNet Operations On-Demand Reporter	Issues/Inquiries pertaining to the FlexNet Operations On-Demand Reporter site.
Technical Support	• Issues that occur past the point of download completion. • Technical product issues/questions.
Unzip Difficulties	Requires help unzipping or uncompressing acompressed file downloaded from SNet.

13

Administer

If you have appropriate permissions, you can use items on the **Administer** menu to perform the following tasks:

Table 13-1 ▪ Administer Menu

Item	Description
Email	Access the email templates which QA Producer Portal uses to build the messages that are sent to your customers.
Email Templates	Manage email templates.
HTML Content	Access additional HTML content that is used in customizations of your FlexNet Producer Portal service.
User Defined Fields	Manage the User Defined Fields which can be added to expand your QA Producer Portal service.

Email

FlexNet Producer Portal can generate many types of email messages. This section of QA Producer Portal allows you to view, edit, copy, and resend those messages. You can also create and send Product and File Update Notification Messages.

The QuickSearch Box lets you search for emails based on the recipients' email address, on the email status (Draft, Queued, or Sent), and on the Email Type (e.g., Entitlement Email, Password Finder, etc.). If you enter more than one search criteria the QuickSearch will find the messages that meet all of the criteria you entered.

FlexNet Producer Portal can generate email messages based on a number of events. If you want to view, copy, or edit emails you can find the ones you are looking for based on a number of attributes, either using the "QuickSearch" bar above or by selecting Search Emails and using the full search functionality.

When you are working with an email message you will see the EMAIL menu at the top of the screen. Depending on your personal permissions, the EMAIL menu allows you to View or Copy an email message. If the message hasn't been sent you can also Edit the Email, or Edit the Distribution List. If the message has been queued but not yet sent, you can remove it from the queue to edit.

Search Emails

In order to view or edit an email message you must first find the one you want. You do this through the Search Emails form which is accessed directly from the menu of the "Email" tab of QA Producer Portal.

You can search for a transaction based on any of the following groups of attributes.

Attributes of the Email Message

- Unique System Email ID
- Email Type (such as Welcome Email, Product Notification, etc.)
- Email Subject
- Status - Draft, Queued, Sent
- Send Date

Attributes of the Member Receiving the Email

- Member ID
- System Member ID
- Email address (e.g., member@company.com)
- Receipt status (Not Sent, Sent Unconfirmed, Sent Confirmed, Sent Failed, User Email Preference off)

Attributes of the Product or File (for Update Notifications)

- Product/File ID
- System Product/File ID
- Product Name
- File Description

Attributes of the Entitlement (for Entitlement-Related Emails)

- Entitlement ID
- System Entitlement ID

You can use the "*" wildcard except in the numeric System ID fields. Click on the **Search** button on the bottom of the form to start your search. If your criteria match more than one email message you will be shown a list of matching transactions and will be able to select the one you want.

Create Product/File Notification Email

You can create Product or File Notification emails which are sent to users who have entitlement to one or more Products or Files, respectively, typically to inform them of updates to the products they own.

To send an update notification you first build a distribution list - the list of Members who will receive the email. Since the distribution list is based on entitlement to Products or Files you first have to identify which Products or Files you want to use. You are given the choice of either listing them explicitly or searching.

You can search for **Products** based on:

- Product ID
- System Product ID
- Product Name
- Version
- Availability (Archived, Currently Available, Not Yet Available)
- Product Manufacturer
- Product Line
- Date Created

You can search for **Files** based on:

- File ID
- System File ID
- File Description
- File Name
- File Status (Loaded or Not Loaded)
- Date Created

If you choose to search for Products/Files matching some criteria, the system will display a list of the search results. Click on the **Notify** checkbox for each of the ones you want to use in building your distribution list. Once you click on the **Submit** button on the bottom of the form you are given some additional distribution list options.

The **Distribution List Options** form displays the default message headers and the list of Products/Files used to build the distribution list. You can set the effective date, namely the date when a member's entitlement must be active in order for them to receive this email message. If you plan to send this email in the future, you should specify the date when the email will be sent out to ensure any members that have entitlements that are not yet active will be included in the distribution list. You can also include expired entitlements by clicking on the checkbox.

Finally, you can list one or more email addresses to be excluded from the distribution list Email address filters use * as the wildcard and multiple filters can be included separated by commas, such as: `*@intraware.com, *.gov`.

When you click the **Submit** button on the bottom of the form, the system will combine the pre-defined email template with the distribution list you have built and begin generating the list of member email addresses for the distribution list. In the meantime the system will display the draft message in the View Email screen.

At this point, you can send the message in its current format or you can Edit the Distribution List, Edit the Email itself, send a preview copy of the message, or make a Copy of the Email to work on separately.

Create Email

If you want to send an AdHoc Email and want it to be logged in the QA Producer Portal application, you can choose **Create Email**. You can enter the Subject and the Body Content and will also have to add the email addreses that you want to receive the email.

By default, the recipients of AdHoc Emails are all BCC'd since they would otherwise see each other's names on their copy of the email message. You should generally not directly address or “CC” a large number of recipients because one or more may accidentally “reply to all” which will generate copies of the reply to everyone on the distribution list.

View Email

The **View Email** page shows the Email header and related information, including the Status of the Email - which can be **Draft**, **Queued**, or **Sent**. The View Email page also shows the Distribution List, namely the list of Members who should get the email message.

For each recipient on the Distribution List the View Email page shows the:

- **Type**—Whether this recipient is a **To**, **CC**, or **BCC**.
- **Email address**—The actual Internet email address that the system sends the message to.
- **Send Status**—Sent, Not Sent, Email Preference Off.
- **Response Status**—Confirmed, Failed, or Unconfirmed.

Both the Text and HTML version of the message Content (if they exist) are displayed on the View Email screen. Note that users will generally only see one of these, depending on how their email client is configured.

The **View Email** screen also lets you send a Preview copy of the email message. To send yourself or someone else a copy of the message enter one or more valid email addresses in the text box. This is a useful final check particularly if you are working with an email that will be sent to a large number of members.

Edit Email

If an email message has not been sent (i.e., the status is **Draft**) you can edit the content of the email by selecting **Edit Email** from the **EMAIL** menu.

***Note** ▪ To edit an Email which is Queued but hasn't been sent, you can use the **EMAIL** menu to **Remove Email From Queue** and then **Edit Email**. Once an email has been sent, you can neither Edit the Email nor Edit the Distribution List.*

The **Edit Email** screen lets you modify the content of the Subject line as well as the Text and HTML version of the content. You can also edit the Note, which lets you add descriptive text to help you manage your email messages.

When you click on the **Preview Text** and **Preview HTML** buttons the system displays a preview of each type of message respectively.

- Click on the **Save Changes** button to save your changes and return to the **View Email** page.
- Click on the **Cancel** button to abandon your edits.

Note that unless you click on the **Save Changes** button, your edits will NOT be saved.

Edit Distribution List

Recipients of an email message my either be directly addressed (**To**), copied (**CC**), or blind copied (**BCC**). By default the recipients of Update Notifications are all BCC'd since they would otherwise see each other's names on their copy of the email message. You should generally not directly address or **CC** a large number of recipients because one or more may accidentally “reply to all” which will generate copies of the reply to everyone on the distribution list.

You can add one or more additional recipients for an email message by typing their email address(es) and clicking the **Add** button. Each time you click the **Add** button the names you just entered are added to the list and you are given the opportunity to add more names. You will need to add each type of recipient, **To**, **CC**, and **BCC**, separately.

You can change the recipient type for each email address on the distribution list using the **Type** dropdown box next to the user's email address.

To delete a user from the distribution list click on the **Delete** checkbox next to the user's email address.

You must click on the **Submit** button on the bottom of the form for your edits to take effect.

Note ▪ *You may not be able to edit a distribution list immediately after creating a Product or File notification since it may take a few minutes to generate the distribution list and a distribution list can't be edited while it is still being generated.*

Copy Email

The Copy Email form allows you to make a new copy of both the content and the distribution list of an existing email message. When you click on **Copy Email** from the EMAIL menu you are presented with a Copy Email form that lets you filter the distribution list based on the recipient status before making the copy. You can choose to include/exclude:

- Not Sent
- Sent and Confirmed
- Sent and Unconfirmed
- Sent and Failed
- Email Preference Off

When you click **Submit** at the bottom of the form, you will see your new message in the View Email screen. You will also see a status message informing you that the email was successfully copied. In the System Email ID field you will see both the new message's ID as well as the ID of the message from which it was copied.

Send Email

You can schedule email messages to be sent immediately or you can queue them to be sent at a later date and time. Before you can actually send the message you are forced to preview the message in the Send Email - Preview screen.

From the Send Email - Preview screen you can choose to Cancel the sending of the message, in which case you'll be taken back to the View Email screen, or you can proceed to Queue the Email message. If you scheduled the email to be sent immediately it will be picked up from the queue the next time the process runs (every few minutes). If you scheduled the email to be sent at a later date or time it will be picked up the first time the process runs after the scheduled date and time.

When you click on the **Queue Email** button you are taken back to the View Email screen. The screen also displays a confirmation that the message has been successfully queued.

As with the View Email screen, you can send a preview copy of your message to one or more email addresses using the Send Preview Email function at the bottom of the screen.

Remove Email From Queue

Whenever a queued message is displayed on the View Email screen the EMAIL menu includes the **Remove Email From Queue** option. If you select this option the View Email screen will be updated and you will see a status message informing you that the email has been removed from the queue. You may now Edit the email content and/or the distribution list. In order to re-queue the message select **Send Email** from the EMAIL menu.

Email Templates

The QA Producer Portal application allows you to change the templates that are used by the QA Producer Portal application to send email to the end user, your customer.

QA Producer Portal offers you flexibility in editing your Email Templates. Create the new text in draft and print for approval. In the mean time your template is saved in a Draft Status. Want to go back to the previous version? Look in your archived versions and change it into the Live version again.

There are three statuses that you need to know about

- **Live**—This template is used by the application to send out an email. There can only be one live template at a time.
- **Draft**—This template is in progress. Changes have been made but it is not ready to be used as the live template yet. You can only have one Draft.
- **Archived**—These templates were once live but have been replaced by newer versions. The system will keep these archived versions of your templates so you can always revert to an old version if needed.

You can also add new HTML content by clicking on **Add HTML Content** in the menu. However, this new content will not be used in your FlexNet Producer Portal service until customizations are made that use this new content. For information on how this content can be used contact your Client Relations Manager.

Editing an Email Template

Select the template that you want to change. If you want to make changes to the Email Template version that is currently live, select the live version by either clicking on the word **Live** or on the Email Template ID in the first column.

If you were already working on a draft, you can select that one to continue your work, by clicking on the word **Draft** from the list. If you need to revert to an archived one, first select the Email Template by clicking on the Email Template ID and from the menu that then appears, select **List All Versions**. From this list you can select the archived version that you want to revert to and then select the option **Edit as New Version** from the Menu.

***Note** ▪ If you have saved a draft Template Version and you edit a live or archived version, you run the risk of overwriting the current draft version. The system will warn you about this.*

An Email Template consists of:

- **Address Information**—You cannot change this information through this application. If you need changes, please contact your Client Relations Manager.
    - **From**—Whom the email is sent from. The application uses an email alias specific to your site for this.
    - **Reply-to**—Typically the same as the **From**. When the user replies to the email sent out by the system, this is the email address the email will be sent to.
    - **CC**—Who will be CC-ed on outgoing emails, typically you find email addresses from your company as well as from Revenera on this. All people that want to monitor the correct working of your site.
    - **BCC**—Same as CC and not be visible to the receiver of the email.
- **Subject**—The subject of the email, you can change this field.
- **Body**—The body of the email which you can also change. The body can be HTML content or text content. Depending on your preferences you can use one or the other. When you use HTML make sure you enter valid HTML since it will be sent out as HTML. (You can also write this content with an external HTML editor and then copy it into the body field). You can also choose to fill out both types of content in which case the receiver, your customer, will receive both types of content as well.

The text of the **Body** and the **Subject** consists of two types:

- **Fixed text**—Text that will be the same for all the receivers of the email, this is text that you can change.
- **User dependent information**—Information that will be different for each receiver of the email, like first and last name, company name, order number etc. This information is shown as a Merge Tag.
    - The email template contains the Merge Tags, and before the email is actually sent, these Merge Tags are replaced with the data specific to the recipient of the email.
    - You can place the Merge Tags in the body and the subject of the email.
    - The application lists the Merge Tags that are available for this email below the body of the email. To make sure you are not making any typos, we recommend that you copy the Merge Tag from the list and paste it in the body/subject.
    - Sometimes Merge Tags are required, meaning that you need to use the tag at least once in the body of the email.

Repeating Blocks

The application allows you to set up repeating blocks of content, for example to display an order with multiple order lines. To do this, start by creating the content that you need for one order line. Then put the [[for-each]] tag at the beginning of this block and the [[end for-each]] at the end of the block. Here are three examples:

```
Nr Quantity Sku Description
[[FOR-EACH TAG="ORDERLINE"]]
[[LINE_NUMBER]] [[QUANTITY]] [[SKU]] [[SKU_DESCRIPTION]]
[[END FOR-EACH]]
```

Displaying Conditional Text Using IF

```
[[FOR-EACH TAG="ORDERLINE"]]
[[IF TAG="SKU" VALUE="cat1"]]
Thank you for ordering Catalog Item 1. Catalog Item 1 helps you get started
with XXXXXX Software. You need to install this software before installing any
other product from XXXXXXX.
[[END IF]]
[[IF TAG="SKU" VALUE="cat2"]]
Thank you for ordering Catalog Item 2.
[[END IF]]
[[IF TAG="SKU" VALUE="cat3"]]
Thank you for ordering Catalog Item 3. After downloading the software, contact
your vendor for the key code.
[[END IF]]
[[END FOR-EACH]]
```

Using the "no value" clause:

```
[[IF TAG="ORDER_UDF" CODE="ImmediateShip" VALUE="Yes"]] Here is the content for
the order emails with the ImmediateShip UDF set to Yes. [[END IF]]

[[IF TAG="ORDER_UDF" CODE="ImmediateShip" VALUENOT="Yes"]] Here is the content
for the order emails with the ImmediateShip UDF not set to Yes. [[END IF]]

[[IFNULL TAG="ORDER_UDF" CODE="ImmediateShip"]] Here is the content for the
order emails with no value (null) for the ImmediateShip UDF (when no
ImmediateShip UDF exists for the Entitlement). [[END IFNULL]]
```

IF tags can also contain nested `ELSIF` or `ELSE` sections. It is important to note that the `ELSEIF` and `ELSE` sections contain an `END ELESEIF` or `END ELSE` tag before the enclosing `END IF`. Below are some examples:

```
[[IF TAG="MEMBER_UDF" CODE="MBR_COUNTRY_CODE" VALUE="FR"]]
Bonjour!
[[ELSEIF TAG="MEMBER_UDF" CODE="MBR_COUNTRY_CODE" VALUE="DE"]]
Guten Tag!
[[END ELSEIF]]
[[ELSE]]
Hello!
[[END ELSE]]
[[END IF]]
[[IF TAG="ADMIN_PRIV" VALUENOT="true"]]
You must contact your site administrator for administrative privileges.
```

```
[[ELSE]]
You are an administrator.
[[END ELSE]]
[[END IF]]
```

Displaying Conditional Text Using CHOOSE

`CHOOSE` blocks are an alternate way of expressing conditional logic. `CHOOSE` blocks are composed of `WHEN` sections where a tag can have a `VALUE` or `VALUENOT` test which behaves the same as IF conditions. `CHOOSE` blocks also have an `OTHERWISE` section. The text in the `OTHERWISE` section is included if none of the `WHEN` sections matched.

It is important that the `WHEN` and `OTHERWISE` sections have matching `END WHEN` and `END OTHERWISE` tags. Any tags or text that are included in between the `CHOOSE` and `END CHOOSE` tags that are not in a `WHEN` or `OTHERWISE` block are ignored.

Below are some examples.

```
[[CHOOSE]]
[[WHEN TAG="MEMBER_UDF" CODE="MBR_COUNTRY_CODE" VALUE="FR"]]
Bonjour!
[[END WHEN]]
[[WHEN TAG="MEMBER_UDF" CODE="MBR_COUNTRY_CODE" VALUE="DE"]]
Guten Tag!
[[END WHEN]]
[[OTHERWISE]]
Hello!
[[END OTHERWISE]]
[[END CHOOSE]]
[[CHOOSE]]
[[WHEN TAG="ADMIN_PRIV" VALUENOT="true"]]
You must contact your site administrator for administrative privileges.
[[END WHEN]]
[[OTHERWISE]]
You are an administrator.
[[END OTHERWISE]]
[[END CHOOSE]]
```

User Defined Fields in Email Templates

If you are using User Defined Fields (UDFs), you can also use these in your Emails. Look in the list of Merge Tags and see if you find a tag like this [[ORDER_UDF]] (for Member it will be MEMBER_UDF, account ACCOUNT_UDF etc.). If that tag is in the list of allowed tags, you can add any UDF that is defined on that level in your Email Template (in the example that would mean you can use Entitlement UDFs but not Member UDFs).

Since you can have many UDFs, you need to add the UDF-ID to the tag which UDF you want to use. If you don't know the value of the UDF-ID, go to the **User Defined Fields** section in the Producer Portal and select **List UDFs**. Here is an example showing how to use a member UDF to localize an email:

```
[[IF TAG="MEMBER_UDF" CODE="LANGUAGE_PREFERENCE" VALUE="US"]] Dear
[[FIRST_NAME]] [[LAST_NAME]],
Welcome to the XXXXXXXX Download Center, an online software delivery service
that helps you manage and stay current with your XXXXXXXX products. You are
receiving this email because [[ACCOUNT_NAME]] has purchased XXXXXXXX products.
```

```
Here is the login and password to [[ACCOUNT_NAME]]'s XXXXXXXX Download Center
site:
Login ID: [[MEMBER_LOGIN]]
Password: [[MEMBER_PASSWORD]]
You may now access your software at https://XXXXXXXX.flexnetoperations.com/
The XXXXXXXX Download Center service provides the following features....
[[END IF]]
[[IF TAG="MEMBER_UDF" CODE="LANGUAGE_PREFERENCE" VALUE="FR"]] Cher, chère
[[FIRST_NAME]] [[LAST_NAME]],
Bienvenue sur le centre de téléchargement de XXXXXXXX, un service de livraison
de logiciel en ligne qui vous aide à gérer vos produits XXXXXXXX tout en
suivant de près leur évolution. Vous recevez cet e-mail car [[ACCOUNT_NAME]]
a fait l'acquisition de produits XXXXXXXX.
Voici l'identifiant et le mot de passe de [[ACCOUNT_NAME]] permettant
d'accéder au site du centre de téléchargement de XXXXXXXX:
Identifiant : [[MEMBER_LOGIN]]
Mot de passe : [[MEMBER_PASSWORD]]
Vous pouvez maintenant accéder à votre logiciel à l'adresse suivante
https://XXXXXXXX.flexnetoperations.com/control/XXXX_FR/index
Le centre de téléchargement de XXXXXXXX propose les fonctionnalités
suivantes....
[[END IF]]
```

Previewing an Email Template

Edit the Body and Subject and click **Preview and Save**. You cannot save an Email Template without previewing the Email. This allows you to see the email the same way an end user would receive it.

Before saving an Email Template, you are asked to preview the way the final mail message will appear to the recipient. During the preview we also check to make sure that you are not using Merge Tags that the application does not allow, and we make sure that required Merge Tags are placed at least once in the body of the email. If this is not the case, you are sent back to the **Edit Email** screen and no preview will be shown. If no errors are found, the application will show you what the email will look like for the end user, replacing the Merge Tags with preview values and in the case it is an HTML template, displaying it that way. Here are some common questions about this page:

- **All the extra white space (like returns and extra lines) is not showing?**—You are writing HTML mail and therefore you will need to use the
 and <p> tag to create your line breaks and paragraph breaks.
- **I want to include an image from my company, how can I do that?**—Just use the image tag like you would on an HTML page but make sure that the SRC parameter is a full path that points to the image on your own webserver. There is no need to upload images to our webservers.
- **I still see a Merge Tag. I thought they would be all replaced?**—There is probably a typo in the brackets and therefore the application does not consider it a Merge Tag and will leave it unchanged. The Merge Tag needs to be opened and closed with a double square bracket like this `[[MERGE_TAG]]`.

Look carefully through the email and make sure that all the Merge Tags are replaced with a preview value. Make sure that the sentences still make sense now that there is real content where the Merge Tag used to be. If you are happy with the result, you can save the Email Template, you have the choice to save it as a **Live** or as a **Draft** template.

- **Live**—When you save it as a Live Template the QA Producer Portal application will use it for all the email of that type from then on.

- **Draft**—If you save it as Draft, you can go back to this version at a later time and (change it) and push it live. If you want to make more changes click **Back to Edit**.

HTML Content

This section of QA Producer Portal allows you to view, add, and edit HTML content that is used in customizations made to your FlexNet Producer Portal service.

You can list all HTML content available by clicking on **List HTML Content**, and can view the versions of this content by clicking on the System HTML Content ID of the content. The draft version of the content can be viewed by clicking on **View Draft**, and past versions can be viewed by clicking on **List All Versions** and then clicking on the **Status** of the version you want to view.

Like Email Templates, HTML content gives you the flexibility of saving a version in a draft status so you can continue work on the version later without affecting the current live content. If you need to revert to an older version, you can go back to a previous version and save it as a new live version.

There are three statuses you need to know about

- **Live**—This is the current version of content that appears on your FlexNet Producer Portal service. Only one version of each HTML content can be live at a time.
- **Draft**—This version is in progress. Changes have been made to this version, but those changes don't yet appear on your FlexNet Producer Portal service. Only one version can be draft at a time.
- **Archived**—These versions were once live but have been replaced with newer ersions.

You can also add new HTML content by clicking on **Add HTML Content** in the menu. However, this new content will not be used in your FlexNet Producer Portal service until customizations are made that use this new content. For information on how this content can be used contact your Client Relations Manager.

User Defined Fields

The **User Defined Fields** section of QA Producer Portal is used to manage additional fields beyond the standard set in QA Producer Portal.

Initially you can display a list of existing fields, sort the existing fields, or add new fields by clicking on **List UDFs**, **Sort UDFs**, or **Add UDFs** respectively. To view or edit a specific UDF, click on its UDF ID in the list.

Contact your Client Relations Manager for more information on how to set up and maintain UDFs.

List User Defined Fields

User defined fields (UDFs) are grouped by their section (which is specified as “level” when adding or editing a UDF) in QA Producer Portal and are listed in sort order. To change the sort order, click on **Sort UDFs** in the menu. You can view and edit an individual UDF by clicking on its ID.

Sort User Defined Fields

User defined fields (UDFs) are sorted by section (i.e., level) in QA Producer Portal. To change the order, enter numbers in the sort order boxes corresponding to the order in which the UDFs should display. This change will be reflected in QA Producer Portal and in the FlexNet Producer Portal site (if UDFs are available there).

The ascending sequence of the numbers is what is evaluated to determine sort order. So, for example, entering the values of 1, 2, and 3 respectively in three fields will have the same sort order as the values 109, 114, and 124. Click on the sort button for each individual section to re-sort that section.

Add User Defined Field

To create a new user defined field enter an ID and Name. Select which section or **Level** that the UDF belongs to. If the new UDF requires a value to be entered at the time of user input click on **Yes** for **Required?**. Two other options may be set: **Multiple Values Allowed?** and **Predefined Values?**. The table below demonstrates how the new UDF field will display in QA Producer Portal based on the entries in both of these options:

Table 13-2 ▪ Add User Defined Field

Multiple Values Allowed?	Predefined Values?	Field Type
No	No	Single text entry box
Yes	No	Multiple text entry boxes with a button to add more
No	Yes	Pulldown select list
Yes	Yes	Multi-select list box

Once you have filled out the **Add UDF** form, submit it using one of the following buttons:

- **Add UDF**—Will create the UDF and then display it in view mode; a menu containing options to edit the UDF will appear.
- **Submit & Add Another UDF**—Will create the UDF and then return you to a blank **Add UDF** screen where you can then add another UDF.
- **Submit & Add Values to this UDF**—which will create the UDF and then automatically take you to the **Add Predefined Values** screen where you can begin adding values to the UDF you just created.

View User-Defined Fields

When you click on a UDF ID from the **List UDFs** page, the system will display the **View UDF** page. The view page displays all of the attributes of the UDF including any predefined values if they exist.

From this page, you can choose to **Edit the UDF**, **Edit Predefined Values**, or **Add Predefined Values** from the **View UDF** menu.

Edit User-Defined Fields

You can use the **Edit UDF** form to modify **UDF Name**, **Required?**, **Multiple Values Allowed?**, **Readonly?**, **UDF Data Type**, **Validation Pattern**, and **Predefined Values?**. The **UDF ID** is a special unique value which cannot be modified. **Sort Order** is only changed via Sort UDFs as the order of UDF display is in relation to other UDFs. See the Add User Defined Field section of this document for a table of implication on changing **Multiple Values Allowed?** and **Predefined Values?**.

Add Predefined Values

To create a new UDF predefined value enter a **Value ID**, **Value Name** and click on the **Add Predefined Value** button. To set the sort order and default value click **Edit Predefined Values**.

Edit Predefined Values

You can change the **Value Name** and **Sort Order**, inactivate and reactivate, and set the **Default?** of UDF predefined values on the **Edit Predefined Values** page.

To change the **Value ID** or **Value Name** simply enter in the new values and click the **Edit Predefined Values** button.

To change the order of display of the predefined values in the pulldown or multi-select box simply enter a number in the **Sort Order** column next to each predefined value that corresponds to the order of display. The ascending sequence of the numbers is what is evaluated to determine sort order. So, for example, entering the values of 1, 2, and 3 respectively in three fields will have the same sort order as the values 109, 114, and 124. Click the Edit **Predefined Values** button to re-sort.

If a predefined value is active there will be a check mark in the **Active?** box next to the UDF predefined value. If there is no check mark it is inactive. You can change the status by checking or unchecking the **Active?** box.

Note ▪ *You cannot inactivate all predefined values. If you need to disable a UDF contact, contact Revenera Support. Click the **Edit Predefined Values** button to inactivate or reactivate your selections.*

The default predefined value is displayed in the pulldown menu. Click on the radio button of a predefined value to make it the default. Click the **Edit Predefined Values** button to set the default.

14

Technical Reference

This chapter includes the following sections which lists the various State/Province codes with their full names and countries codes:

- State and Province Codes for the US and Canada
- Country Codes

State and Province Codes for the US and Canada

Below is a list of valid State and Province codes for the US and Canada. They are listed alphabetically by Country Code, then State/Province Full Name.

Table 14-1 ▪ State/Province Code and Full Name

Country Code	State/Province Code	State / Province Full Name
CA	AB	Alberta
CA	BC	British Columbia
CA	MB	Manitoba
CA	NB	New Brunswick
CA	NL	Newfoundland and Labrador
CA	NS	Nova Scotia
CA	NT	Northwest Territories
CA	NU	Nunavut
CA	ON	Ontario

Table 14-1 ▪ State/Province Code and Full Name

Country Code	State/Province Code	State / Province Full Name
CA	PE	Prince Edward Island
CA	QC	Quebec
CA	SK	Saskatchewan
CA	YT	Yukon
US	AA	Armed
US	AE	Armed Forces Europe/Canada/ Africa/M East
US	AK	Alaska
US	AL	Alabama
US	AP	Armed Forces Pacific
US	AR	Arkansas
US	AS	America Samoa
US	AZ	Arizona
US	CA	California
US	CO	Colorado
US	CT	Connecticut
US	DC	District of Columia
US	DE	Delaware
US	FL	Florida
US	GA	Georgia
US	GU	Guam
US	HI	Hawaii
US	IA	Iowa
US	ID	Idaho

Table 14-1 • State/Province Code and Full Name

Country Code	State/Province Code	State / Province Full Name
US	IL	Illinois
US	IN	Indiana
US	KS	Kansas
US	KY	Kentucky
US	LA	Louisiana
US	MA	Massachusetts
US	MD	Maryland
US	ME	Maine
US	MI	Michigan
US	MN	Minnesota
US	MO	Missouri
US	MP	Northern Mariana Islands
US	MS	Mississippi
US	MT	Montana
US	NC	North Carolina
US	ND	North Dakota
US	NE	Nebraska
US	NH	New Hampshire
US	NJ	New Jersey
US	NM	New Mexico
US	NV	Nevada
US	NY	New York
US	OH	Ohio
US	OK	Oklahoma

Table 14-1 • State/Province Code and Full Name

Country Code	State/Province Code	State / Province Full Name
US	OR	Oregon
US	PA	Pennsylvania
US	PR	Puerto Rico
US	RI	Rhode Island
US	SC	South Carolina
US	SD	South Dakota
US	TN	Tennessee
US	TX	Texas
US	UT	Utah
US	VA	Virginia
US	VI	Virgin Islands
US	VT	Vermont
US	WA	Washington
US	WI	Wisconsin
US	WV	West Virginia
US	WY	Wyoming

Country Codes

Below is a list of valid Country Codes. They are listed alphabetically by Country Full Name.

Table 14-2 • Country Code

Code	Country Full Name
AD	Andorra
AE	United Arab Emirates
AF	Afghanistan

Table 14-2 ▪ Country Code

Code	Country Full Name
AG	Antigua & Barbuda
AI	Anguilla
AL	Albania
AM	Armenia
AN	Netherlands Antilles
AO	Angola
AQ	Antarctica
AR	Argentina
AS	American Samoa
AT	Austria
AU	Australia
AW	Aruba
AX	Aland Islands
AZ	Azerbaijan
BA	Bosnia and Herzegovina
BB	Barbados
BD	Bangladesh
BE	Belgium
BF	Burkina Faso
BG	Bulgaria
BH	Bahrain
BI	Burundi
BJ	Benin
BL	Saint Barthelemy

Table 14-2 ▪ Country Code

Code	Country Full Name
BM	Bermuda
BN	Brunei
BO	Bolivia
BQ	Bonaire, Sint Eustatius, and Saba
BR	Brazil
BS	Bahamas
BT	Bhutan
BV	Bouvet Island
BW	Botswana
BY	Belarus
BZ	Belize
CA	Canada
CC	Cocos (Keeling) Islands
CD	Congo, The Democratic Republic of The
CF	Central African Republic
CG	Congo
CH	Switzerland
CI	Ivory Coast
CK	Cook Islands
CL	Chile
CM	Cameroon
CN	China
CO	Colombia
CR	Costa Rica

Table 14-2 ▪ Country Code

Code	Country Full Name
CS	Serbia and Montenegro
CU	Cuba
CV	Cape Verde
CW	Curacao
CX	Christmas Island
CY	Cyprus
CZ	Czech Republic
DE	Germany
DJ	Djibouti
DK	Denmark
DM	Dominica
DO	Dominican Republic
DZ	Algeria
EC	Ecuador
EE	Estonia
EG	Egypt
EH	Western Sahara
ER	Eritrea
ES	Spain
ET	Ethiopia
FI	Finland
FJ	Fiji
FK	Falkland Islands
FM	Federated States of Micronesia

Table 14-2 • Country Code

Code	Country Full Name
FO	Faroe Islands
FR	France
GA	Gabon
GB	United Kingdom
GD	Grenada
GE	Georgia
GF	French Guiana
GG	Guernsey
GH	Ghana
GI	Gibraltar
GL	Greenland
GM	Gambia
GN	Guinea
GP	Guadeloupe
GQ	Equatorial Guinea
GR	Greece
GS	S. Georgia & S. Sandwich Islands
GT	Guatemala
GU	Guam
GW	Guinea-Bissau
GY	Guyana
HK	Hong Kong
HM	Heard and Mcdonald Islands
HN	Honduras

Table 14-2 • Country Code

Code	Country Full Name
HR	Croatia
HT	Haiti
HU	Hungary
ID	Indonesia
IE	Ireland
IL	Israel
IM	Isle of Man
IN	India
IO	British Indian Ocean Territory
IQ	Iraq
IR	Iran
IS	Iceland
IT	Italy
JE	Jersey
JM	Jamaica
JO	Jordan
JP	Japan
KE	Kenya
KG	Kyrgyzstan
KH	Cambodia
KI	Kiribati
KM	Comoros
KN	St. Kitts and Nevis
KP	North Korea

Table 14-2 • Country Code

Code	Country Full Name
KR	South Korea
KW	Kuwait
KY	Cayman Islands
KZ	Kazakhstan
LA	Laos
LB	Lebanon
LC	St. Lucia
LI	Liechtenstein
LK	Sri Lanka
LR	Liberia
LS	Lesotho
LT	Lithuania
LU	Luxembourg
LV	Latvia
LY	Libya
MA	Morocco
MC	Monaco
MD	Moldova
ME	Montenegro
MF	Saint Martin (French Part)
MG	Madagascar
MH	Marshall Islands
MK	FYROM
ML	Mali

Table 14-2 • Country Code

Code	Country Full Name
MM	Myanmar (Burma)
MN	Mongolia
MO	Macau
MP	Northern Mariana Islands
MQ	Martinique
MR	Mauritania
MS	Montserrat
MT	Malta
MU	Mauritius
MV	Maldives
MW	Malawi
MX	Mexico
MY	Malaysia
MZ	Mozambique
NA	Namibia
NC	New Caledonia
NE	Niger
NF	Norfolk Island
NG	Nigeria
NI	Nicaragua
NL	Netherlands
NO	Norway
NP	Nepal
NR	Nauru

Table 14-2 ▪ Country Code

Code	Country Full Name
NU	Niue
NZ	New Zealand
OM	Oman
PA	Panama
PE	Peru
PF	French Polynesia
PG	Papua New Guinea
PH	Philippines
PK	Pakistan
PL	Poland
PM	St. Pierre and Miquelon
PN	Pitcairn
PR	Puerto Rico
PS	Palestine, State Of
PT	Portugal
PW	Palau
PY	Paraguay
QA	Qatar
RE	Reunion
RO	Romania
RS	Serbia
RU	Russia
RW	Rwanda
SA	Saudi Arabia

Table 14-2 ▪ Country Code

Code	Country Full Name
SB	Solomon Islands
SC	Seychelles
SD	Sudan
SE	Sweden
SG	Singapore
SH	Saint Helena
SI	Slovenia
SJ	Svalbard and Jan Mayen
SK	Slovakia
SL	Sierra Leone
SM	San Marino
SN	Senegal
SO	Somalia
SR	Suriname
SS	South Sudan, Republic of
ST	St. Tome and Principe
SV	El Salvador
SX	Sint Maarten (Dutch Part)
SY	Syria
SZ	Swaziland
TC	Turks & Caicos Islands (BWI)
TD	Chad
TF	French Southern Territories
TG	Togo

Table 14-2 ▪ Country Code

Code	Country Full Name
TH	Thailand
TJ	Tajikistan
TK	Tokelau
TL	Timor-Leste
TM	Turkmenistan
TN	Tunisia
TO	Tonga
TP	East Timor
TR	Turkey
TT	Trinidad and Tobago
TV	Tuvalu
TW	Taiwan
TZ	Tanzania
UA	Ukraine
UG	Uganda
UM	US Minor Outlying Islands
US	USA
UY	Uruguay
UZ	Uzbekistan
VA	Vatican City
VC	St. Vincent and the Grenadines
VE	Venezuela
VG	Virgin Islands (British)
VI	Virgin Islands

Table 14-2 • Country Code

Code	Country Full Name
VN	Viet Nam
VU	Vanuatu
WF	Wallis & Futuna Islands
WS	Samoa
XK	Kosovo (User-defined XK)
YE	Yemen Republic
YT	Mayotte
YU	Yugoslavia
ZA	South Africa
ZM	Zambia
ZW	Zimbabwe
ZZ	Unknown

15

FlexNet Operations LLM Web Services Implementation

This section provides information regarding the web service calls that have been implemented in FlexNet Operations LLM for various transactions.

The web service API (SWSAPI) allows customers to manage data related to Accounts and Members, Entitlements, and Product hierarchy entities within the FlexNet Operations service from external ERP and CRM systems. The API uses Simple Object Access Protocol (SOAP) objects generated from a Web Services Definitional Language (WSDL) file.

This section includes the following information:

Table 15-1 ▪ Web Services Implementation Topics

Section	Description
API Operations	Descriptions of the supported API operations.
Sample SOAP Calls	Link to download a sample XML file that can be used to transfer a session ID programmatically between two requests.

API Operations

This section describes the following API operations:

- Add
- Add Update
- Associate
- Changed Since
- Disassociate
- Find Requests

- FNE Requests
- Get Requests
- License Requests
- Merge Account
- Reidentify
- Restrict Product / File
- Unrestrict Product / File
- Transfer Order
- Update

Add

This section describes the **Add** API operation.

- Login (Add)
- Add Product
- Add Account
- Add Order
- Add Order (with Member, w/o FlexLicenseModel)
- Add Catalog
- Add Product
- Add License Token

Note ▪ *Execute the login call to obtain the session ID. Paste the session ID from the Login Response to proceed. Session ID would resemble:*

```
c6f115ca-d46a-4ef5-8c70-2bb9c40faa52DWoR1Bxa3/QWCpaaqMbh0/KVLpN7LSUKT6t66RAL8JijHnUuT/wpHrM=
```

Login (Add)

The login call needs to be executed to obtain the session ID for all other SOAP calls.

Important ▪ *Change PartnerCode to the specific partner where the SOAP call is intended to be run.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header/>
   <soapenv:Body>
      <uri:Login>
         <uri:Username>system@example.com</uri:Username>
```

```
            <uri:Password>password1</uri:Password>
            <uri:PartnerCode>TEST</uri:PartnerCode>
         </uri:Login>
      </soapenv:Body>
   </soapenv:Envelope>
```

Add Product

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <Add xmlns="uri:webservice.subscribenet.intraware.com">
         <SubscribeNetObject xsi:type="uri1:Product" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference xsi:type="uri1:ProductReference">
               <uri1:ID>WSProduct2</uri1:ID>
            </uri1:Reference>
            <uri1:Description>Product definition</uri1:Description>
            <uri1:Version>10</uri1:Version>
            <uri1:EffectiveDate>2021-01-01</uri1:EffectiveDate>
            <uri1:ExpirationDate>2021-12-31</uri1:ExpirationDate>
            <uri1:ArchiveDate>2022-01-01</uri1:ArchiveDate>
            <uri1:SortGroup>1</uri1:SortGroup>
            <uri1:ExtendedDescription>WS Product</uri1:ExtendedDescription>
            <uri1:ExportComplianceClassification>
               <!-- For NLR, T = Yes, F = No -->
               <uri1:NLR>F</uri1:NLR>
               <!-- Expected values for ECCNCode: NO_EXPORT, NOT_APPLICABLE, UNKNOWN, 3D002, 3D991 -->
               <uri1:ECCNCode>UNKNOWN</uri1:ECCNCode>
               <!--uri1:ENCCode></uri1:ENCCode>
               <uri1:CCATSCode></uri1:CCATSCode-->
            </uri1:ExportComplianceClassification>
            <uri1:ProductManufacturer>
               <uri1:ID>MANU_DOWNLOAD</uri1:ID>
            </uri1:ProductManufacturer>
            <uri1:ProductLine>
               <uri1:ID>PLNE_DOWNLOAD</uri1:ID>
            </uri1:ProductLine>
            <!--uri1:LicenseGroup>
            <uri1:ID>FNP_Template_Base</uri1:ID>
            </uri1:LicenseGroup-->
            <!--uri1:EndUserLicenseAgreement>
            <uri1:AgreementName>ExportComplianceTestAgreement</uri1:AgreementName>
            </uri1:EndUserLicenseAgreement-->
            <!--Product note = Download Instructions -->
            <uri1:ProductNote>ProductNote</uri1:ProductNote>
         <uri1:PhysicalDistributionAvailable>0</uri1:PhysicalDistributionAvailable>
            <!--uri1:UserDefinedField code="QA_UDF">Created by QA</uri1:UserDefinedField-->
         </SubscribeNetObject>
```

```
        </Add>
    </soapenv:Body>
</soapenv:Envelope>
```

Add Account

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <SessionHeader>
         <uri:SessionID xmlns:uri="uri:webservice.subscribenet.intraware.com"></uri:SessionID>
      </SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <Add xmlns="uri:webservice.subscribenet.intraware.com">
         <SubscribeNetObject xsi:type="uri1:Account" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference xsi:type="uri1:AccountReference">
               <uri1:ID xsi:type="xsd:string">TestAccount</uri1:ID>
            </uri1:Reference>
               <uri1:AccountName xsi:type="xsd:string">TestAccount</uri1:AccountName>
               <uri1:AccountNote xsi:type="xsd:string">TESTNOTE Active Account</uri1:AccountNote>
               <uri1:Status>ACTIVE</uri1:Status>
         </SubscribeNetObject>
      </Add>
   </soapenv:Body>
</soapenv:Envelope>
```

Add Order

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <SessionHeader>
         <uri:SessionID xmlns:uri="uri:webservice.subscribenet.intraware.com"></uri:SessionID>
      </SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Add xmlns:uri="uri:webservice.subscribenet.intraware.com">
         <SubscribeNetObject xsi:type="uri1:Order" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference xsi:type="uri1:OrderReference">
               <uri1:ID xsi:type="uri1:string">DEMO_Order01</uri1:ID>
            </uri1:Reference><uri1:Account xsi:type="uri1:AccountReference">
            <uri1:IntrawareID>36838975</uri1:IntrawareID></uri1:Account>
            <uri1:OrderDate xsi:type="xs:date">2011-02-06</uri1:OrderDate>
            <uri1:PurchaseOrderID xsi:type="xsd:string">DEMO_Order01</uri1:PurchaseOrderID>
            <uri1:SalesRep>TestRep</uri1:SalesRep>
            <uri1:InvoiceID xsi:type="xsd:string">WSOrder01</uri1:InvoiceID>
            <uri1:InvoiceDate xsi:type="xs:date">2012-12-12</uri1:InvoiceDate>
            <uri1:OrderNote>WS Order</uri1:OrderNote>
            <uri1:OrderLine xsi:type="uri1:OrderLine">
               <uri1:LineNumber>1</uri1:LineNumber>
               <uri1:TemporaryOrderLine>FALSE</uri1:TemporaryOrderLine>
               <uri1:Price>0</uri1:Price>
               <uri1:SKU>QATest_DRS_Feature_1_AddOn</uri1:SKU>
```

```
                <uri1:EffectiveDate>2012-02-06</uri1:EffectiveDate>
                <uri1:ExpirationDate>2012-12-31</uri1:ExpirationDate>
                <uri1:Quantity>10</uri1:Quantity>
                <uri1:DownloadLimit>1</uri1:DownloadLimit>
                <uri1:LicenseCode></uri1:LicenseCode>
                <uri1:LicenseFileName></uri1:LicenseFileName>
                <uri1:LicenseFileCode></uri1:LicenseFileCode>
                <uri1:FlexLicenseModel xsi:type="uri1:LicenseModelIdentifier">
                   <uri1:Code>DATABASE</uri1:Code>
                   <uri1:Name>AS_DurationBased_Feature</uri1:Name>
                   <uri1:IntrawareLicenseModelID>3</uri1:IntrawareLicenseModelID>
                </uri1:FlexLicenseModel>
                <uri1:Status>ACTIVE</uri1:Status>
             </uri1:OrderLine>
             <uri1:TO>system@example.com</uri1:TO>
          </SubscribeNetObject>
       </uri:Add>
    </soapenv:Body>
</soapenv:Envelope>
```

Add Order (with Member, w/o FlexLicenseModel)

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
 <soapenv:Header>
 <SessionHeader>
 <uri:SessionID xmlns:uri="uri:webservice.subscribenet.intraware.com"></uri:SessionID>
 </SessionHeader>
 </soapenv:Header>
 <soapenv:Body>
 <uri:Add xmlns:uri="uri:webservice.subscribenet.intraware.com">
 <SubscribeNetObject xsi:type="uri1:Order" xmlns:uri1="uri:subscribenet.intraware.com">
 <uri1:Reference xsi:type="uri1:OrderReference">
 <uri1:ID xsi:type="uri1:string">DEMO_Order01</uri1:ID>
 </uri1:Reference>
 <uri1:Account xsi:type="uri1:AccountReference">
 <uri1:IntrawareID>7124712</uri1:IntrawareID>
 </uri1:Account>
 <uri1:Member xsi:type="uri1:MemberReference">
 <uri1:Email xsi:type="xsd:string">dturtle@intraware.com</uri1:Email>
 <uri1:AccountReference xsi:type="uri1:AccountReference">
 <uri1:IntrawareID xsi:type="xsd:string">7124712</uri1:IntrawareID>
 </uri1:AccountReference>
 </uri1:Member>
 <uri1:OrderDate xsi:type="xs:date">2011-02-06</uri1:OrderDate>
 <uri1:PurchaseOrderID xsi:type="xsd:string">DEMO_Order01</uri1:PurchaseOrderID>
 <uri1:SalesRep>TestRep</uri1:SalesRep>
 <uri1:InvoiceID xsi:type="xsd:string">WSOrder01</uri1:InvoiceID>
 <uri1:InvoiceDate xsi:type="xs:date">2012-12-12</uri1:InvoiceDate>
 <uri1:OrderNote>WS Order</uri1:OrderNote>
 <uri1:OrderLine xsi:type="uri1:OrderLine">
 <uri1:LineNumber>1</uri1:LineNumber>
 <uri1:TemporaryOrderLine>FALSE</uri1:TemporaryOrderLine>
 <uri1:Price>0</uri1:Price>
 <uri1:SKU>testCatalog20130423a</uri1:SKU>
```

```
 <uri1:EffectiveDate>2012-02-06</uri1:EffectiveDate>
 <uri1:ExpirationDate>2012-12-31</uri1:ExpirationDate>
 <uri1:Quantity>10</uri1:Quantity>
 <uri1:DownloadLimit>1</uri1:DownloadLimit>
 <uri1:LicenseCode></uri1:LicenseCode>
 <uri1:LicenseFileName></uri1:LicenseFileName>
 <uri1:LicenseFileCode></uri1:LicenseFileCode>
 <uri1:Status>ACTIVE</uri1:Status>
 </uri1:OrderLine>
 </SubscribeNetObject>
 </uri:Add>
 </soapenv:Body>
</soapenv:Envelope>
```

Add Catalog

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Add xmlns="uri:webservice.subscribenet.intraware.com">
        <SubscribeNetObject xsi:type="uri1:CatalogItem" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference xsi:type="uri1:CatalogItemReference">
                <uri1:ID xsi:type="xsd:string">AS_Test_Catalog_1</uri1:ID>
            </uri1:Reference>
            <uri1:Description>Catalog definition</uri1:Description>
            <uri1:Type>NORMAL</uri1:Type>
            <uri1:Subscription>FALSE</uri1:Subscription>
            <uri1:Temporary>FALSE</uri1:Temporary>
            <uri1:DefaultDurationYear>1</uri1:DefaultDurationYear>
            <uri1:DefaultDurationMonth>7</uri1:DefaultDurationMonth>
            <uri1:DefaultDurationDay>15</uri1:DefaultDurationDay>
            <uri1:CatalogManufacturer>
                <uri1:ID>QAAUTOManufacturer</uri1:ID>
            </uri1:CatalogManufacturer>
            <uri1:CatalogProductLine>
                <uri1:ID>QAAUTOPlne</uri1:ID>
            </uri1:CatalogProductLine>
        </SubscribeNetObject>
      </uri:Add>
   </soapenv:Body>
</soapenv:Envelope>
```

Add Product

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
```

```
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID>b8439903-afe3-445d-9c52-c15c5621678bc7unuY8f9cpUIcZWoOUpVW9EVXb3yA==</
uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <Add xmlns="uri:webservice.subscribenet.intraware.com">
        <SubscribeNetObject xsi:type="uri1:Product" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference xsi:type="uri1:ProductReference">
                <uri1:ID>WSProduct2</uri1:ID>
            </uri1:Reference>
            <uri1:Description>Product definition</uri1:Description>
            <uri1:Version>10</uri1:Version>
            <uri1:EffectiveDate>2014-03-31</uri1:EffectiveDate>
            <uri1:ExpirationDate>2014-12-31</uri1:ExpirationDate>
            <uri1:ArchiveDate>2015-01-01</uri1:ArchiveDate>
            <uri1:SortGroup>1</uri1:SortGroup>
            <uri1:ExtendedDescription>WS Product</uri1:ExtendedDescription>
            <uri1:ExportComplianceClassification>
                <!-- For NLR, T = Yes, F = No -->
                <uri1:NLR>F</uri1:NLR>
                <!-- Expected values for ECCNCode: NO_EXPORT, NOT_APPLICABLE, UNKNOWN, 3D002, 3D991 etc
-->
                <uri1:ECCNCode>UNKNOWN</uri1:ECCNCode>
                <!--uri1:ENCCode></uri1:ENCCode>
                <uri1:CCATSCode></uri1:CCATSCode-->
            </uri1:ExportComplianceClassification>
            <uri1:ProductManufacturer>
                <uri1:ID>FW123</uri1:ID>
            </uri1:ProductManufacturer>
            <uri1:ProductLine>
                <uri1:ID>FW-Win</uri1:ID>
            </uri1:ProductLine>
            <uri1:LicenseGroup>
                <uri1:ID>FNP_Template_Base</uri1:ID>
            </uri1:LicenseGroup>
            <uri1:EndUserLicenseAgreement>
                <uri1:AgreementName>ExportComplianceTestAgreement</uri1:AgreementName>
            </uri1:EndUserLicenseAgreement>
            <uri1:EvaluationEndUserLicenseAgreement>
                <uri1:AgreementName>Kelly's Agreement</uri1:AgreementName>
            </uri1:EvaluationEndUserLicenseAgreement>
            <!--Product note = Download Instructions -->
            <uri1:ProductNote>ProductNote</uri1:ProductNote>
            <uri1:PhysicalDistributionAvailable>0</uri1:PhysicalDistributionAvailable>
            <uri1:UserDefinedField code="QA_UDF">Created by QA</uri1:UserDefinedField>
        </SubscribeNetObject>
    </Add>
   </soapenv:Body>
</soapenv:Envelope>
```

Add License Token

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <Add xmlns="uri:webservice.subscribenet.intraware.com">
        <SubscribeNetObject xsi:type="uri1:LicenseToken" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference>
                <uri1:ID xsi:type="xsd:string">TKN01</uri1:ID>
            </uri1:Reference>
            <uri1:CatalogItem xsi:type="uri1:CatalogItemReference">
                <uri1:ID>QATEST_FNPCert_Package</uri1:ID>
            </uri1:CatalogItem>
            <uri1:Product xsi:type="uri1:ProductReference">
                <uri1:ID>QATEST_FNPCert_Package</uri1:ID>
            </uri1:Product>
            <uri1:EntitlementEffectiveDate xsi:type="xsd:date">2013-07-31</
uri1:EntitlementEffectiveDate>
            <uri1:EntitlementExpirationDate xsi:type="xsd:date">2014-07-30</
uri1:EntitlementExpirationDate>
            <uri1:EntitlementQuantity xsi:type="xsd:positiveInteger">5</uri1:EntitlementQuantity>
            <uri1:Register xsi:type="uri1:RegisterType">REQUIRED</uri1:Register>
            <uri1:AdminPrivilege>TRUE</uri1:AdminPrivilege>
            <uri1:DownloadPrivilege>TRUE</uri1:DownloadPrivilege>
            <uri1:ExpirationDate xsi:type="xsd:date">2014-07-30</uri1:ExpirationDate>
            <uri1:Status>ACTIVE</uri1:Status>
            <uri1:DownloadLimit>1</uri1:DownloadLimit>
            <uri1:UserDefinedField code="ACCOUNT-ACCT_LOGO">http://logo.com/image/main.png</
uri1:UserDefinedField>
            <uri1:UserDefinedField code="ORDER-CHANNEL-PARTNER-ID">TST2</uri1:UserDefinedField>
            <uri1:UserDefinedField code="ORDERLINE-LIC_EXP_DATE">2015-07-31</uri1:UserDefinedField>
            <uri1:UserDefinedField code="TOKEN_NOTIF_TO">system@example.com</uri1:UserDefinedField>
            <uri1:UserDefinedField code="TOKEN_NOTIF_CC">testuser@test.com</uri1:UserDefinedField>
            <uri1:UserDefinedField code="TOKEN_NOTIF_BCC">anothertestuser@test.com</
uri1:UserDefinedField>
        </SubscribeNetObject>
    </Add>
   </soapenv:Body>
</soapenv:Envelope>
```

Add Update

This section describes the **Add Update** API operation.

- Login (Add Update)
- Add Update Order
- Add Update Account

- Add Update Member
- Add Update Catalog
- Add Update Product
- Add Update File
- Add Update License Token

Note ▪ *Execute the login call to obtain the session ID. Paste the session ID from the Login Response to proceed. Session ID would resemble:*

```
c6f115ca-d46a-4ef5-8c70-2bb9c40faa52DWoR1Bxa3/QWCpaaqMbh0/KVLpN7LSUKT6t66RAL8JijHnUuT/wpHrM=
```

Login (Add Update)

The login call needs to be executed to obtain the session ID for all other SOAP calls.

Important ▪ *Change PartnerCode to the specific partner where the SOAP call is intended to be run.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header/>
   <soapenv:Body>
      <uri:Login>
         <uri:Username>system@example.com</uri:Username>
         <uri:Password>password1</uri:Password>
         <uri:PartnerCode>TEST</uri:PartnerCode>
      </uri:Login>
   </soapenv:Body>
</soapenv:Envelope>
```

Add Update Order

```
Order Email Directive can be DEFAULT, FORCE, SUPPRESS.
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
<soapenv:Header>
<SessionHeader>
<uri:SessionID xmlns:uri="uri:webservice.subscribenet.intraware.com">session ID from login response</
uri:SessionID>
</SessionHeader>
<OptionsHeader>
<uri:OrderEmailDirective>DEFAULT</uri:OrderEmailDirective>
<uri:OrderEmailVariation>QA_Order_Variation</uri:OrderEmailVariation>
</OptionsHeader>
</soapenv:Header>
<soapenv:Body>
<AddUpdate xmlns="uri:webservice.subscribenet.intraware.com">
<SubscribeNetObject xsi:type="uri1:Order" xmlns:uri1="uri:subscribenet.intraware.com">
```

```
<uri1:Reference xsi:type="uri1:OrderReference">
<uri1:ID xsi:type="uri1:string">WSOrder01</uri1:ID>
</uri1:Reference>
<uri1:Account xsi:type="uri1:AccountReference">
<uri1:IntrawareID>35854451</uri1:IntrawareID>
</uri1:Account>
<uri1:OrderDate xsi:type="xs:date">2011-12-12</uri1:OrderDate>
<uri1:PurchaseOrderID xsi:type="xsd:string">WSOrder01</uri1:PurchaseOrderID>
<uri1:SalesRep>TestRep</uri1:SalesRep>
<uri1:InvoiceID xsi:type="xsd:string">WSOrder01</uri1:InvoiceID>
<uri1:InvoiceDate xsi:type="xs:date">2011-12-12</uri1:InvoiceDate>
<uri1:OrderNote>WS Order</uri1:OrderNote>
<uri1:OrderLine xsi:type="uri1:OrderLine">
<uri1:LineNumber>1</uri1:LineNumber>
<uri1:TemporaryOrderLine>FALSE</uri1:TemporaryOrderLine>
<uri1:Price>0</uri1:Price>
<uri1:SKU>Catalog01</uri1:SKU>
<uri1:EffectiveDate>2011-12-12</uri1:EffectiveDate>
<uri1:ExpirationDate>2013-12-31</uri1:ExpirationDate>
<uri1:Quantity>10</uri1:Quantity>
<uri1:DownloadLimit>1</uri1:DownloadLimit>
<uri1:LicenseCode></uri1:LicenseCode>
<uri1:LicenseFileName></uri1:LicenseFileName>
<uri1:LicenseFileCode></uri1:LicenseFileCode>
<uri1:Status>ACTIVE</uri1:Status>
</uri1:OrderLine>
<uri1:TO>system@example.com</uri1:TO>
</SubscribeNetObject>
</AddUpdate>
</soapenv:Body>
</soapenv:Envelope>
```

Add Update Account

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
<soapenv:Header>
<SessionHeader>
<uri:SessionID xmlns:uri="uri:webservice.subscribenet.intraware.com"></uri:SessionID>
</SessionHeader>
</soapenv:Header>
<soapenv:Body>
<AddUpdate xmlns="uri:webservice.subscribenet.intraware.com">
<SubscribeNetObject xsi:type="uri1:Account" xmlns:uri1="uri:subscribenet.intraware.com">
<!-- If changes need to be made to a particular account enter Intraware ID. If new account needs to be
added, supply Account ID against the ID tag -->
<!-- <uri1:Reference xsi:type="uri1:AccountReference">
<uri1:IntrawareID>IntrawareID</uri1:IntrawareID>
<uri1:ID>AccountID</uri1:ID>
</uri1:Reference> -->
<uri1:AccountName xsi:type="xsd:string">TestAccount01</uri1:AccountName>
<uri1:AccountNote xsi:type="xsd:string">TESTNOTE5</uri1:AccountNote>
<uri1:Status>ACTIVE</uri1:Status>
<uri1:UserDefinedField code = "qa_test_udf">qa</uri1:UserDefinedField>
</SubscribeNetObject>
```

```
</AddUpdate>
</soapenv:Body>
</soapenv:Envelope>
```

Add Update Member

```
Member Email Directive can be DEFAULT, FORCE, SUPPRESS
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
    <soapenv:Header>
        <SessionHeader>
            <uri:SessionID xmlns:uri="uri:webservice.subscribenet.intraware.com"></uri:SessionID>
        </SessionHeader>
        <OptionsHeader>
            <uri:MemberEmailDirective>DEFAULT</uri:MemberEmailDirective>
            <uri:MemberEmailVariation>QA_Variation_01</uri:MemberEmailVariation>
        </OptionsHeader>
    </soapenv:Header>
    <soapenv:Body>
        <AddUpdate xmlns="uri:webservice.subscribenet.intraware.com">
            <SubscribeNetObject xsi:type="uri1:Member" xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:Reference xsi:type="uri1:MemberReference">
                    <uri1:Email xsi:type="xsd:string">testuser_456@test.com</uri1:Email>
                    <uri1:ID xsi:type="uri1:string">testuser_456@test.com</uri1:ID>
                    <uri1:AccountReference xsi:type="uri1:AccountReference">
                        <uri1:IntrawareID>37591627</uri1:IntrawareID>
                    </uri1:AccountReference>
                </uri1:Reference>
                <uri1:FirstName xsi:type="xsd:string">TestUser</uri1:FirstName>
                <uri1:LastName xsi:type="xsd:string">LastName</uri1:LastName>
                <uri1:JobTitle>TestJobTitle</uri1:JobTitle>
                <uri1:Phone>8474664603</uri1:Phone>
                <uri1:Fax>8474664604</uri1:Fax>
                <uri1:AddressLine1>1000 E Woodfield Road</uri1:AddressLine1>
                <uri1:AddressLine2></uri1:AddressLine2>
                <uri1:AddressLine3></uri1:AddressLine3>
                <uri1:AddressLine4></uri1:AddressLine4>
                <uri1:City>Schaumburg</uri1:City>
                <uri1:State>IL</uri1:State>
                <uri1:PostalCode>60173</uri1:PostalCode>
                <uri1:Country>US</uri1:Country>
                <uri1:AdminPrivilege>TRUE</uri1:AdminPrivilege>
                <uri1:DownloadPrivilege>TRUE</uri1:DownloadPrivilege>
                <uri1:MemberNote>TestNote</uri1:MemberNote>
                <uri1:Status>ACTIVE</uri1:Status>
                <uri1:UserDefinedField code="QaUser?">Yes</uri1:UserDefinedField>
            </SubscribeNetObject>
        </AddUpdate>
    </soapenv:Body>
</soapenv:Envelope>
```

Add Update Catalog

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <AddUpdate xmlns="uri:webservice.subscribenet.intraware.com">
        <SubscribeNetObject xsi:type="uri1:CatalogItem" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference xsi:type="uri1:CatalogItemReference">
                <uri1:IntrawareID>4011461</uri1:IntrawareID>
            </uri1:Reference>
            <uri1:Description>Catalog definition</uri1:Description>
            <uri1:Type>NORMAL</uri1:Type>
            <uri1:Subscription>FALSE</uri1:Subscription>
            <uri1:Temporary>FALSE</uri1:Temporary>
            <uri1:DefaultDurationYear>1</uri1:DefaultDurationYear>
            <uri1:DefaultDurationMonth>7</uri1:DefaultDurationMonth>
            <uri1:DefaultDurationDay>15</uri1:DefaultDurationDay>
            <uri1:CatalogManufacturer>
                <uri1:ID>QAAUTOManufacturer</uri1:ID>
            </uri1:CatalogManufacturer>
            <uri1:CatalogProductLine>
                <uri1:ID>QAAUTOPlne</uri1:ID>
            </uri1:CatalogProductLine>
            <uri1:StatusCode>INACTIVE</uri1:StatusCode>
        </SubscribeNetObject>
    </AddUpdate>
   </soapenv:Body>
</soapenv:Envelope>
```

Add Update Product

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <AddUpdate xmlns="uri:webservice.subscribenet.intraware.com">
        <SubscribeNetObject xsi:type="uri1:Product" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference xsi:type="uri1:ProductReference">
                <uri1:ID>WSProduct1</uri1:ID>
            </uri1:Reference>
            <uri1:Description>Product definition</uri1:Description>
            <uri1:Version>10</uri1:Version>
```

```
            <uri1:EffectiveDate>2014-03-31</uri1:EffectiveDate>
            <uri1:ExpirationDate>2014-12-31</uri1:ExpirationDate>
            <uri1:ArchiveDate>2015-01-01</uri1:ArchiveDate>
            <uri1:SortGroup>1</uri1:SortGroup>
            <uri1:ExtendedDescription>WS Product</uri1:ExtendedDescription>
            <uri1:ExportComplianceClassification>
                <!-- For NLR, T = Yes, F = No -->
                <uri1:NLR>F</uri1:NLR>
                <!-- Expected values for ECCNCode: NO_EXPORT, NOT_APPLICABLE, UNKNOWN, 3D002, 3D991 etc
-->
                <uri1:ECCNCode>UNKNOWN</uri1:ECCNCode>
                <!--uri1:ENCCode></uri1:ENCCode>
                <uri1:CCATSCode></uri1:CCATSCode-->
            </uri1:ExportComplianceClassification>
            <uri1:ProductManufacturer>
                <uri1:ID>FW123</uri1:ID>
            </uri1:ProductManufacturer>
            <uri1:ProductLine>
                <uri1:ID>FW-Win</uri1:ID>
            </uri1:ProductLine>
            <uri1:LicenseGroup>
                <uri1:ID>FNP_Template_Base</uri1:ID>
            </uri1:LicenseGroup>
            <uri1:EndUserLicenseAgreement>
                <uri1:AgreementName>ExportComplianceTestAgreement</uri1:AgreementName>
            </uri1:EndUserLicenseAgreement>
            <uri1:EvaluationEndUserLicenseAgreement>
                <uri1:AgreementName>Kelly's Agreement</uri1:AgreementName>
            </uri1:EvaluationEndUserLicenseAgreement>
            <!--Product note = Download Instructions -->
            <uri1:ProductNote>ProductNote</uri1:ProductNote>
            <uri1:PhysicalDistributionAvailable>0</uri1:PhysicalDistributionAvailable>
            <uri1:UserDefinedField code="QA_UDF">Created by QA</uri1:UserDefinedField>
        </SubscribeNetObject>
    </AddUpdate>
   </soapenv:Body>
</soapenv:Envelope>
```

Add Update File

```
<soapenv:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:soapenv="http://
schemas.xmlsoap.org/soap/envelope/" xmlns:uri="uri:subscribenet.intraware.com"> <soapenv:Header>
   <uri:SessionHeader>
     <uri:SessionID></uri:SessionID>
   </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
     <uri:AddUpdate xmlns="uri:webservice.subscribenet.intraware.com">
        <SubscribeNetObject xmlns:uri1="uri:subscribenet.intraware.com" xsi:type="uri:File">
            <uri:Reference>
                   <uri:ID>JBFileID</uri:ID>
           </uri:Reference>
                  <uri:Description>JB Test File</uri:Description>
                  <uri:ExtendedDescription>Extended Description</uri:ExtendedDescription>
        </SubscribeNetObject>
```

```
      </uri:AddUpdate>
   </soapenv:Body>
</soapenv:Envelope>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
         <uri:OptionsHeader/>
         <uri:SessionHeader>
               <uri:SessionID></uri:SessionID>
         </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
          <AddUpdate xmlns="uri:webservice.subscribenet.intraware.com">
               <SubscribeNetObject xsi:type="uri1:File" xmlns:uri1="uri:subscribenet.intraware.com">
                      <uri1:Reference xsi:type="uri1:FileReference">
                              <uri1:ID>File_4011461</uri1:ID>
                      </uri1:Reference>
                      <uri1:Description>MyFileDescription</uri1:Description>
                      <uri1:ExtendedDescription>File definition</uri1:ExtendedDescription>
                      <uri1:FileName>MytestFile.txt</uri1:FileName>
                      <uri1:UserDefinedField code="<UDF-ID>">1</uri1:UserDefinedField>
              </SubscribeNetObject>
        </AddUpdate>
    </soapenv:Body>
</soapenv:Envelope>
```

Add Update License Token

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
    <soapenv:Header>
        <SessionHeader>
            <uri:SessionID xmlns:uri="uri:webservice.subscribenet.intraware.com"></uri:SessionID>
        </SessionHeader>
        <OptionsHeader>
            <uri:OrderEmailDirective>DEFAULT</uri:OrderEmailDirective>
            <uri:OrderEmailVariation>DEFAULT</uri:OrderEmailVariation>
        </OptionsHeader>
    </soapenv:Header>
    <soapenv:Body>
        <AddUpdate xmlns="uri:webservice.subscribenet.intraware.com">
            <SubscribeNetObject xsi:type="uri1:LicenseToken"
xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:Reference>
                    <uri1:ID xsi:type="xsd:string">TestLicToken20130807f</uri1:ID>
                </uri1:Reference>
                <uri1:CatalogItem xsi:type="uri1:CatalogItemReference">
<!--                    For DEMO -->
                    <uri1:ID>QATEST_FNPCert_Package</uri1:ID>
<!--                    <uri1:ID>ASTestCatalog-A</uri1:ID> -->
<!--                    For SYBS
                    <uri1:ID>10098</uri1:ID> -->
                </uri1:CatalogItem>
```

```
                <uri1:Product xsi:type="uri1:ProductReference">
<!--                    For DEMO -->
                    <uri1:ID>QATEST_FNPCert_Package</uri1:ID>
<!--                    <uri1:ID>ASTestProduct-A</uri1:ID> -->
<!--                    For SYBS
                    <uri1:ID>10098-75-1500-41</uri1:ID> -->
                </uri1:Product>
                <uri1:EntitlementEffectiveDate xsi:type="xsd:date">2013-07-31</
uri1:EntitlementEffectiveDate>
                <uri1:EntitlementExpirationDate xsi:type="xsd:date">2014-07-30</
uri1:EntitlementExpirationDate>
                <uri1:EntitlementQuantity xsi:type="xsd:positiveInteger">5</uri1:EntitlementQuantity>
                <uri1:Register xsi:type="uri1:RegisterType">NOT_ALLOWED</uri1:Register>
                <uri1:AdminPrivilege>TRUE</uri1:AdminPrivilege>
                <uri1:DownloadPrivilege>TRUE</uri1:DownloadPrivilege>
                <uri1:ExpirationDate xsi:type="xsd:date">2014-07-30</uri1:ExpirationDate>
                <uri1:Status>ACTIVE</uri1:Status>
                <uri1:DownloadLimit>1</uri1:DownloadLimit>
<!--    In SYBS           <uri1:UserDefinedField code="ORDERLINE-LICENSE-TYPE">ST</
uri1:UserDefinedField>-->
            </SubscribeNetObject>
        </AddUpdate>
    </soapenv:Body>
</soapenv:Envelope>
```

Associate

This section describes the **Associate** API operation.

- Login (Associate)
- Associate Product to Catalog
- Associate File to Product

Important ▪ *Can only associate one entity at a time.*

Note ▪ *Execute the login call to obtain the session ID. Paste the session ID from the Login Response to proceed. Session ID would resemble:*

`c6f115ca-d46a-4ef5-8c70-2bb9c40faa52DWoR1Bxa3/QWCpaaqMbh0/KVLpN7LSUKT6t66RAL8JijHnUuT/wpHrM=`

Login (Associate)

Note ▪ *The login call needs to be executed to obtain the session ID for all other SOAP calls.*

Important ▪ *Change PartnerCode to the specific partner where the SOAP call is intended to be run.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header/>
   <soapenv:Body>
      <uri:Login>
         <uri:Username>system@example.com</uri:Username>
         <uri:Password>password1</uri:Password>
         <uri:PartnerCode>TEST</uri:PartnerCode>
      </uri:Login>
   </soapenv:Body>
</soapenv:Envelope>
```

Associate Product to Catalog

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
        <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Associate>
        <!-- Catalog Item -->
        <uri:SubscribeNetObjectReference xsi:type="uri1:CatalogItemReference">
            <uri1:ID>AS_XMLCatalog_07</uri1:ID>
         </uri:SubscribeNetObjectReference>
        <!--Can add only one file at a time->
        <!-- Product to be associated -->
         <uri:SubscribeNetObjectReferenceAss xsi:type="uri1:ProductInCatReference">
            <uri1:ID>AS_FNP_Nodelocked</uri1:ID>
         </uri:SubscribeNetObjectReferenceAss>
      </uri:Associate>
   </soapenv:Body>
</soapenv:Envelope>
```

Associate File to Product

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
        <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Associate>
        <!-- Product -->
         <uri:SubscribeNetObjectReference xsi:type="uri1:ProductReference">
            <uri1:ID>AS_FNP_Nodelocked</uri1:ID>
```

```
            </uri:SubscribeNetObjectReference>
             <!--Can add only one file at a time->
              <!-- File to be associated -->
            <uri:SubscribeNetObjectReferenceAss xsi:type="uri1:FileInProductReference">
               <uri1:ID>AS_File_11101</uri1:ID>
            </uri:SubscribeNetObjectReferenceAss>
         </uri:Associate>
      </soapenv:Body>
   </soapenv:Envelope>
```

Changed Since

This section describes the **Changed Since** API operation.

The changedSince web service request is used to retrieve an entity/object that changed within a specified time-frame.

- Limitations
- Endpoints

Limitations

- Can check only within a 30 day period. An exception is thrown if the duration exceeds this time-frame.
- Start and End dates are required.
- Will return the IDs for the entities that changed - no other additional information is returned in the response
- As of 2016.05 R2 release, this has been implemented only for the following entities
  - Account
  - Member
  - Catalog Item

Endpoints

The following are the endpoints for Changed Since API operation:

Table 15-2 • Changed Since Endpoints

Environment	Endpoint
UAT	https://manageruat.flexnetoperations.com/service/snetmgr/services/SubscribeNet
PROD	https://manager.flexnetoperations.com/service/snetmgr/services/SubscribeNet

Disassociate

This section describes the **Disassociate** API operation.

- Login (Disassociate)
- Disassociate Product from Catalog
- Disassociate File from Product

***Note** ▪ Execute the login call to obtain the session ID. Paste the session ID from the Login Response to proceed. Session ID would resemble:*

```
c6f115ca-d46a-4ef5-8c70-2bb9c40faa52DWoR1Bxa3/QWCpaaqMbh0/KVLpN7LSUKT6t66RAL8JijHnUuT/wpHrM=
```

***Important** ▪ Can only disassociate one entity at a time.*

Login (Disassociate)

***Note** ▪ The login call needs to be executed to obtain the session ID for all other SOAP calls.*

***Important** ▪ Change PartnerCode to the specific partner where the SOAP call is intended to be run.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header/>
   <soapenv:Body>
      <uri:Login>
         <uri:Username>system@example.com</uri:Username>
         <uri:Password>password1</uri:Password>
         <uri:PartnerCode>TEST</uri:PartnerCode>
      </uri:Login>
   </soapenv:Body>
</soapenv:Envelope>
```

Disassociate Product from Catalog

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
        <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Disassociate>
        <!-- Catalog Item -->
        <uri:SubscribeNetObjectReference xsi:type="uri1:CatalogItemReference">
            <uri1:ID>AS_XMLCatalog_07</uri1:ID>
         </uri:SubscribeNetObjectReference>
```

```
        <!--Can remove only one file at a time->
        <!-- Product to be disassociated -->
         <uri:SubscribeNetObjectReferenceAss xsi:type="uri1:ProductInCatReference">
            <uri1:ID>AS_FNP_Nodelocked</uri1:ID>
         </uri:SubscribeNetObjectReferenceAss>
      </uri:Disassociate>
   </soapenv:Body>
</soapenv:Envelope>
```

Disassociate File from Product

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
        <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Disassociate>
        <!-- Product -->
         <uri:SubscribeNetObjectReference xsi:type="uri1:ProductReference">
            <uri1:ID>AS_FNP_Nodelocked</uri1:ID>
         </uri:SubscribeNetObjectReference>
          <!--Can remove only one file at a time->
           <!-- File to be disassociated -->
         <uri:SubscribeNetObjectReferenceAss xsi:type="uri1:FileInProductReference">
            <uri1:ID>AS_File_11101</uri1:ID>
         </uri:SubscribeNetObjectReferenceAss>
      </uri:Disassociate>
   </soapenv:Body>
</soapenv:Envelope>
```

Find Requests

This section describes the **Find Requests** API operation.

- Find Orders
- Find Orders by UDF
- Find Orders by Order Line UDF

Find Orders

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
    <soapenv:Header>
        <uri:SessionHeader>
```

```
            <uri:SessionID></uri:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <uri:Find xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="AccountOrderReferencesReference">
                <uri1:IntrawareID>35854451</uri1:IntrawareID>
            </uri:SubscribeNetObjectReference>
        </uri:Find>
    </soapenv:Body>
</soapenv:Envelope>
```

Find Orders by UDF

```
Finds orders based on Order level UDF
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <uri:Find xmlns="uri:subscribenet.intraware.com">
        <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="OrderUdfReference">
            <uri1:UdfCode>ORD-UDF-3</uri1:UdfCode>
            <uri1:UdfValue>AS Test Value</uri1:UdfValue>
        </uri:SubscribeNetObjectReference>
    </uri:Find>
   </soapenv:Body>
</soapenv:Envelope>
```

Find Orders by Order Line UDF

***Note** ▪ Can use System UDF ID and/or UDF ID for UdfCode.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <uri:Find xmlns="uri:subscribenet.intraware.com">
        <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="OrderLineUdfReference">
            <uri1:UdfCode>SystemUDFID</uri1:UdfCode>
                 <!-- AND/OR -->
            <uri1:UdfCode>UDFID</uri1:UdfCode>
```

```
            <uri1:UdfValue>value</uri1:UdfValue>
        </uri:SubscribeNetObjectReference>
    </uri:Find>
   </soapenv:Body>
</soapenv:Envelope>
```

Find Members

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com"  xmlns:uri1="uri:subscribenet.intraware.com">
    <soapenv:Header>
        <uri:SessionHeader>
            <uri:SessionID></uri:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <uri:Find xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="AccountMembersReference">
                <uri1:IntrawareID>35854451</uri1:IntrawareID>
                <uri1:ActiveOnly>false</uri1:ActiveOnly>
            </uri:SubscribeNetObjectReference>
        </uri:Find>
    </soapenv:Body>
</soapenv:Envelope>
```

Find License Model

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Find xmlns="uri:subscribenet.intraware.com">
         <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="LicenseModelReference">
         </uri:SubscribeNetObjectReference>
      </uri:Find>
   </soapenv:Body>
</soapenv:Envelope>
```

LicenseReference / Request

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID>711fbd3f-66f1-4199-aeaf-6c34a35b5a7ccx3fJZ0ZNAjqzjeitsxtPaI=</uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Find xmlns="uri:subscribenet.intraware.com">
         <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="LicenseReference">
            <uri1:ActivationCode>3692-0C4B-3DD3-6040</uri1:ActivationCode>
            <uri1:AccountID>=HYPERLINK("https://whsec.us","click here")</uri1:AccountID>
            <uri1:OrderID>ENT_test1</uri1:OrderID>
            <uri1:ProductID>prod_n2</uri1:ProductID>
            <uri1:LineNumber>1</uri1:LineNumber>
         </uri:SubscribeNetObjectReference>
      </uri:Find>
   </soapenv:Body>
</soapenv:Envelope>
```

LicenseReference / Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:soapenc="http://
schemas.xmlsoap.org/soap/encoding/" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:xsi="http://
www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header/>
   <soapenv:Body>
      <p130:FindResponse xmlns:p130="uri:webservice.subscribenet.intraware.com">
         <p130:SubscribeNetObject xsi:type="p1:License" xmlns:p1="uri:subscribenet.intraware.com">
            <p1:Reference>
               <p1:ID>67702482</p1:ID>
            </p1:Reference>
            <p1:OrderID>ENT_test1</p1:OrderID>
            <p1:OrderLineNumber>1</p1:OrderLineNumber>
            <p1:GeneratedByMember>Anonymous Anonymous (anonymous-snet@flexnetoperations.com)</
p1:GeneratedByMember>
            <p1:HostID>5BB0EA2C9306A287810F5F3CDA7ED17DC83FCDEB</p1:HostID>
            <p1:LicenseQuantity>1</p1:LicenseQuantity>
            <p1:LicenseFileName xsi:nil="true"/>
            <p1:LicenseKey xsi:nil="true"/>
            <p1:LicenseByteKey/>
         </p130:SubscribeNetObject>
      </p130:FindResponse>
   </soapenv:Body>
</soapenv:Envelope>
```

FNE Requests

This section describes the **FNE Requests** API operation.

- Login (FNE Requests)
- Get Requests

Login (FNE Requests)

***Note** ▪ The login call needs to be executed to obtain the session ID for all other SOAP calls.*

***Important** ▪ Change PartnerCode to the specific partner where the SOAP call is intended to be run.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header/>
   <soapenv:Body>
      <uri:Login>
         <uri:Username>system@example.com</uri:Username>
         <uri:Password>password1</uri:Password>
         <uri:PartnerCode>TEST</uri:PartnerCode>
      </uri:Login>
   </soapenv:Body>
</soapenv:Envelope>
```

Get Requests

Get Server

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
```

```
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
    <soapenv:Header>
          <uri:SessionHeader>
             <uri:SessionID></uri:SessionID>
          </uri:SessionHeader>
        </soapenv:Header>
    <soapenv:Body>
          <uri:Get xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xsi:type="uri1:FNEServerReference"
xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:ID>AS_FNEServer_1</uri1:ID>
                <uri1:PublisherName>fnedemo</uri1:PublisherName>
                <uri1:HostIDType>ETHERNET</uri1:HostIDType>
                    </uri:SubscribeNetObjectReference>
           </uri:Get>
    </soapenv:Body>
</soapenv:Envelope>
(OR)
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
<soapenv:Header>
<uri:SessionHeader>
<uri:SessionID>????</uri:SessionID>
</uri:SessionHeader>
</soapenv:Header>
<soapenv:Body>
<uri:Get xmlns="uri:subscribenet.intraware.com">
<uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="FNEServerReference">
<uri1:ID>3E4FE2L9MN5Z</uri1:ID>
<uri1:PublisherName>fnedemo</uri1:PublisherName>
<uri1:HostIDType>STRING</uri1:HostIDType>
</uri:SubscribeNetObjectReference>
</uri:Get>
</soapenv:Body>
</soapenv:Envelope>
```

Get Catalog Flex Licensing

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID> </uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Get xmlns="uri:subscribenet.intraware.com">
             <uri1:SubscribeNetObjectReference xsi:type="uri1:CatalogFlexLicensingReference"
xmlns:uri1="uri:subscribenet.intraware.com">
        <uri1:IntrawareID>4001401</uri1:IntrawareID>
     </uri1:SubscribeNetObjectReference>
      </uri:Get>
```

```
   </soapenv:Body>
</soapenv:Envelope>
```

Get Default Hosted Server

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
    <soapenv:Header>
          <uri:SessionHeader>
             <uri:SessionID>56b5ee3d-3273-4bc1-afa5-724587455274ZUmBH4HHxqagXraXPclMg==</uri:SessionID>
          </uri:SessionHeader>
        </soapenv:Header>
    <soapenv:Body>
          <uri:Get xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xsi:type="uri1:DefaultHostedServerReference"
xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:Account xsi:type="uri1:AccountReference">
                    <uri1:IntrawareID>35210013</uri1:IntrawareID>
                </uri1:Account>
                </uri:SubscribeNetObjectReference>
           </uri:Get>
    </soapenv:Body>
</soapenv:Envelope>
```

Get Device

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <uri:Get xmlns="uri:subscribenet.intraware.com">
        <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="DeviceReference">
                <uri1:ID>Dev01</uri1:ID>
                <uri1:HostIDType>ETHERNET</uri1:HostIDType>
                <uri1:PublisherName>hwclient</uri1:PublisherName>
        </uri:SubscribeNetObjectReference>
    </uri:Get>
   </soapenv:Body>
</soapenv:Envelope>
```

Get FNE Trusted Storage

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
    <soapenv:Header>
```

```
           <uri:SessionHeader>
              <uri:SessionID></uri:SessionID>
           </uri:SessionHeader>
         </soapenv:Header>
    <soapenv:Body>
          <uri:Get xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xsi:type="uri1:FNEHostTrustedStorageReference">
                <uri1:ID>AS_WSDev_03</uri1:ID>
                <uri1:PublisherName>fnedemo</uri1:PublisherName>
                <uri1:HostIDType>ETHERNET</uri1:HostIDType>
            </uri:SubscribeNetObjectReference>
           </uri:Get>
    </soapenv:Body>
</soapenv:Envelope>
```

Find Requests

- Find Device
- Find Server
- Find Feature

Find Device

By ID

Passing Device ID will find all devices with that ID (multiple host ID types)

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <uri:Find xmlns="uri:subscribenet.intraware.com">
        <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="DeviceReference">
            <uri1:ID>Dev01</uri1:ID>
        </uri:SubscribeNetObjectReference>
    </uri:Find>
   </soapenv:Body>
</soapenv:Envelope>
```

By other parameters

Passing one of Account ID, AddOn SKU, Activation Code and Order ID will find all devices with that value. It is also possible to find a device for a combination of these parameters.

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:SessionHeader>
```

```
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Find>
         <uri:SubscribeNetObjectReference xsi:type="uri1:DeviceReference"
xmlns:uri1="uri:subscribenet.intraware.com">
        <uri1:AccountID>AS_AddOnAccount</uri1:AccountID>
        <uri1:AddOnSKU>AXSCards-hwc</uri1:AddOnSKU>
        <uri1:ActivationCode>7B99-E6B9-8646-6BE6</uri1:ActivationCode>
        <uri1:OrderID>AddOn_AXSCards-hwc</uri1:OrderID>
        </uri:SubscribeNetObjectReference>
      </uri:Find>
   </soapenv:Body>
</soapenv:Envelope>
```

Find Server

By ID

```
Passing Server ID will find all Servers with that ID (multiple host ID types)
From 2013.11 release, can also pass Backup Server ID.
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <uri:Find xmlns="uri:subscribenet.intraware.com">
        <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="FNEServerReference">
            <uri1:ID>PrimaryServer_01</uri1:ID>
            <uri1:HostIDType>ETHERNET</uri1:HostIDType>
            <uri1:PublisherName>hwclient</uri1:PublisherName>
        </uri:SubscribeNetObjectReference>
    </uri:Find>
   </soapenv:Body>
</soapenv:Envelope>
```

By Account ID

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:SessionHeader>
          <uri:SessionID>810651c9-e779-4a2b-a63f-e383c6622dadLRWxuVlu6r2OeiGUDU3lPQBEkE=</
uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
          <uri:Find>
```

```
                <uri:SubscribeNetObjectReference xsi:type="uri1:FNEServerReference"
xmlns:uri1="uri:subscribenet.intraware.com">
                       <uri1:AccountID>AS_AddOnAccount</uri1:AccountID>
                </uri:SubscribeNetObjectReference>
         </uri:Find>
   </soapenv:Body>
</soapenv:Envelope>
```

By Activation Code

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
      <soapenv:Header>
            <uri:SessionHeader>
                    <uri:SessionID>810651c9-e779-4a2b-a63f-e383c6622dadLRWxuVlu6r2OeiGUDU3lPQBEkE=</
uri:SessionID>
            </uri:SessionHeader>
      </soapenv:Header>
      <soapenv:Body>
              <uri:Find>
                    <uri:SubscribeNetObjectReference xsi:type="uri1:FNEServerReference"
xmlns:uri1="uri:subscribenet.intraware.com">
                            <uri1:ActivationCode>CB1E-ACE6-0455-0AE6</uri1:ActivationCode>
                    </uri:SubscribeNetObjectReference>
              </uri:Find>
     </soapenv:Body>
</soapenv:Envelope>
```

By Order ID

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
    <soapenv:Header>
           <uri:SessionHeader>
                   <uri:SessionID>810651c9-e779-4a2b-a63f-e383c6622dadLRWxuVlu6r2OeiGUDU3lPQBEkE=</
uri:SessionID>
           </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
            <uri:Find>
                  <uri:SubscribeNetObjectReference xsi:type="uri1:FNEServerReference"
xmlns:uri1="uri:subscribenet.intraware.com">
                         <uri1:OrderID>WSOrder02102020-i</uri1:OrderID>
                  </uri:SubscribeNetObjectReference>
            </uri:Find>
    </soapenv:Body>
</soapenv:Envelope>
```

Find Feature

Retrieve All

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <uri:Find xmlns="uri:subscribenet.intraware.com">
        <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="FlexFeatureReference">
        </uri:SubscribeNetObjectReference>
    </uri:Find>
   </soapenv:Body>
</soapenv:Envelope>
```

Retrieve Specific

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <uri:Find xmlns="uri:subscribenet.intraware.com">
        <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="FlexFeatureReference">
            <uri1:FeatureName>Bin1</uri1:FeatureName>
            <uri1:Version>1.0</uri1:Version>
        </uri:SubscribeNetObjectReference>
    </uri:Find>
   </soapenv:Body>
</soapenv:Envelope>
```

Add Requests

- Add Feature
- Add Server Host Type
- Add Server
- Add CLS
- Add Device

Add Feature

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Add xmlns="uri:webservice.subscribenet.intraware.com">
        <SubscribeNetObject xsi:type="uri1:FlexFeature" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference>
                <uri1:FeatureName>AS_Test_Feature_1</uri1:FeatureName>
                <uri1:Version>1.0000</uri1:Version>
            </uri1:Reference>
            <uri1:Description>Feature created via web service</uri1:Description>
            <uri1:Counted>TRUE</uri1:Counted>
            <uri1:Scale>10</uri1:Scale>
            <uri1:Reusable>FALSE</uri1:Reusable>
        </SubscribeNetObject>
      </uri:Add>
   </soapenv:Body>
</soapenv:Envelope>
```

Add Server Host Type

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Add xmlns="uri:webservice.subscribenet.intraware.com">
     <SubscribeNetObject xsi:type="uri1:FNEServerHostType" xmlns:uri1="uri:subscribenet.intraware.com">
        <uri1:Reference xsi:type="uri1:FNEServerHostTypeReference">
            <uri1:ID xsi:type="xsd:string">AS_FNEServerHostType_2</uri1:ID>
        </uri1:Reference>
        <uri1:Name>AS_FNEServerHostType_2</uri1:Name>
        <uri1:PublisherName>fnedemo</uri1:PublisherName>
        <uri1:IdentityName>fnedemo</uri1:IdentityName>
     </SubscribeNetObject>
      </uri:Add>
   </soapenv:Body>
</soapenv:Envelope>
```

Add Server

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
       <uri:Add xmlns="uri:webservice.subscribenet.intraware.com">
     <SubscribeNetObject xsi:type="uri1:FNEServer" xmlns:uri1="uri:subscribenet.intraware.com">
        <uri1:Reference>
            <uri1:ID>PrimaryServer_01</uri1:ID>
            <uri1:HostIDType>ETHERNET</uri1:HostIDType>
        </uri1:Reference>
        <uri1:BackupID>BackupServer_01</uri1:BackupID>
        <uri1:FNEServerHostType>
            <uri1:Reference>
                <uri1:ID>hosttypeID1</uri1:ID>
            </uri1:Reference>
        </uri1:FNEServerHostType>
        <uri1:Alias>Server_01</uri1:Alias>
        <uri1:Notes>DEMO Test Server</uri1:Notes>
        <uri1:Owner>
            <uri1:ID>TestAccount</uri1:ID>
            <uri1:IntrawareID>37647181</uri1:IntrawareID>
        </uri1:Owner>
     </SubscribeNetObject>
      </uri:Add>
   </soapenv:Body>
</soapenv:Envelope>
```

Add CLS

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   <uri:OptionsHeader/></soapenv:Header>
   <soapenv:Body>
       <uri:Add xmlns="uri:webservice.subscribenet.intraware.com">
     <SubscribeNetObject xsi:type="uri1:FNEServer" xmlns:uri1="uri:subscribenet.intraware.com">
        <uri1:Deployment>CLOUD</uri1:Deployment>
        <uri1:Alias>Owned by: system@example.com</uri1:Alias>
        <uri1:Notes>UsesDefaultHostType</uri1:Notes>
        <uri1:SiteName>AS-Itasca</uri1:SiteName>
        <!-- If you want to specify a server host type, use this. Not specifying a host type will create
the CLS with default host type -->
```

```
        <!--uri1:FNEServerHostType>
            <uri1:Reference>
                <uri1:ID>FLX_SERVER</uri1:ID>
            </uri1:Reference>
        </uri1:FNEServerHostType-->
        <uri1:Owner>
                        <uri1:ID>AS_AddOnAccount</uri1:ID>
                        <!--uri1:IntrawareID>37647181</uri1:IntrawareID-->
                </uri1:Owner>
     </SubscribeNetObject>
      </uri:Add>
   </soapenv:Body>
</soapenv:Envelope>
```

Add Device

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
       <uri:Add xmlns="uri:webservice.subscribenet.intraware.com">
     <SubscribeNetObject xsi:type="uri1:Device" xmlns:uri1="uri:subscribenet.intraware.com">
        <uri1:Reference xsi:type="uri1:DeviceReference">
            <uri1:ID>Dev01</uri1:ID>
            <uri1:PublisherName>hwclient</uri1:PublisherName>
            <uri1:HostIDType>FLEXID10</uri1:HostIDType>
        </uri1:Reference>
        <uri1:Alias>Dev01</uri1:Alias>
        <uri1:Notes>WebServicesTest-set host id type in add device request</uri1:Notes>
        <uri1:DeviceModel>
             <!-- Intraware IDs no longer displayed -->
            <!--uri1:IntrawareID>283</uri1:IntrawareID> -->
            <uri1:ID>FLX_CLIENT</uri1:ID>
         </uri1:DeviceModel>
        <uri1:LicenseModel>
            <uri1:Code>DEFAULT_BASE</uri1:Code>
<!--            Uncomment to use user defined device base license model -->
<!--            <uri1:Code>DATABASE</uri1:Code>
            <uri1:IntrawareLicenseModelID>511</uri1:IntrawareLicenseModelID> -->
        </uri1:LicenseModel>
     </SubscribeNetObject>
      </uri:Add>
   </soapenv:Body>
</soapenv:Envelope>
```

AddUpdate Requests

- AddUpdate Flex Feature

AddUpdate Flex Feature

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
          <AddUpdate xmlns="uri:webservice.subscribenet.intraware.com">
        <SubscribeNetObject xsi:type="uri1:FlexFeature" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference>
                <uri1:FeatureName>AS_Test_Feature_1</uri1:FeatureName>
                <uri1:Version>1.0000</uri1:Version>
                <uri1:VendorName>demo</uri1:VendorName>
            </uri1:Reference>
            <uri1:Description>Feature Updated via addupdate web service</uri1:Description>
            <uri1:Counted>TRUE</uri1:Counted>
            <uri1:Reusable>FALSE</uri1:Reusable>
        </SubscribeNetObject>
</AddUpdate>
   </soapenv:Body>
</soapenv:Envelope>
```

Update Requests

- Update Catalog for Flex Licensing
- Update Device Alias
- Update Server Alias
- Update Server - Map AddOns
- Update Device – Map AddOns
- Update FNE Trusted Storage - Server
- Update FNE Trusted Storage - Device
- Update Device Owner
- Update Server Owner
- Update Device License File

Update Catalog for Flex Licensing

```
(As of 2014.02 release, vendor name has been removed)
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Update xmlns="uri:webservice.subscribenet.intraware.com">
        <SubscribeNetObject xsi:type="uri1:CatalogFlexLicensing"
xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:CatalogItem>
                <uri1:IntrawareID>3609763</uri1:IntrawareID>
                <uri1:ID xsi:type="xsd:string">Catalog-A</uri1:ID>
            </uri1:CatalogItem>
            <uri1:CountedFeature>
                <uri1:Feature>
                    <uri1:FeatureName>AS_Accounts</uri1:FeatureName>
                    <uri1:Version>1.0</uri1:Version>
                    <!--uri1:VendorName>fnedemo</uri1:VendorName-->
                </uri1:Feature>
                <uri1:Count>1</uri1:Count>
            </uri1:CountedFeature>
            <uri1:LicenseModel>
               <!-- If you want to use default order line license model, uncomment "ONLY" the following
line-->
                <!--uri1:Code>DEFAULT_ORDERLINE</uri1:Code-->
               <!-- If you want to use user defined license model, uncomment the following TWO_lines-->
                <!--uri1:Code>DATABASE</uri1:Code-->
                <!--uri1:IntrawareLicenseModelID>1613</uri1:IntrawareLicenseModelID-->
            </uri1:LicenseModel>
            <!--uri1:UsageModelID>2</uri1:UsageModelID-->
         </SubscribeNetObject>
      </uri:Update>
   </soapenv:Body>
</soapenv:Envelope>
```

Update Device Alias

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
  <soapenv:Header>
       <uri:SessionHeader>
             <uri:SessionID>3eec80b4-ec1f-4796-94b5-
225f87f25daf6iVANUoaQ0vz4bAPf6oG4xxiE1doju4LOhH2lIcG4cK7</uri:SessionID>
       </uri:SessionHeader>
       <uri:OptionsHeader/>
  </soapenv:Header>
```

```
  <soapenv:Body>
        <uri:Update xmlns="uri:webservice.subscribenet.intraware.com">
             <SubscribeNetObject xsi:type="uri1:Device" xmlns:uri1="uri:subscribenet.intraware.com">
                 <uri1:Reference xsi:type="uri1:DeviceReference">
                     <uri1:ID>AS_Device_Aug2015</uri1:ID>
                     <uri1:PublisherName>fnedemo</uri1:PublisherName>
                     <uri1:HostIDType>STRING</uri1:HostIDType>
                 </uri1:Reference>
                 <uri1:Alias>Europe Region</uri1:Alias>
             </SubscribeNetObject>
        </uri:Update>
  </soapenv:Body>
</soapenv:Envelope>
```

Update Server Alias

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
  <soapenv:Header>
       <uri:SessionHeader>
             <uri:SessionID>3eec80b4-ec1f-4796-94b5-
225f87f25daf6iVANUoaQ0vz4bAPf6oG4xxiE1doju4LOhH2lIcG4cK7</uri:SessionID>
       </uri:SessionHeader>
       <uri:OptionsHeader/>
  </soapenv:Header>
  <soapenv:Body>
        <uri:Update xmlns="uri:webservice.subscribenet.intraware.com">
             <SubscribeNetObject xsi:type="uri1:Device" xmlns:uri1="uri:subscribenet.intraware.com">
                 <uri1:Reference xsi:type="uri1:FNEServerReference">
                     <uri1:ID>Server123</uri1:ID>
                     <uri1:PublisherName>fnedemo</uri1:PublisherName>
                     <uri1:HostIDType>STRING</uri1:HostIDType>
                 </uri1:Reference>
                 <uri1:Alias>NAM Region</uri1:Alias>
             </SubscribeNetObject>
        </uri:Update>
  </soapenv:Body>
</soapenv:Envelope>
```

Update Server - Map AddOns

```
Note: Backup Server ID is also accepted (since 2013.11 release)
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
```

```
      <uri:Update xmlns="uri:webservice.subscribenet.intraware.com">
     <SubscribeNetObject xsi:type="uri1:FNEHostAddOnCounts"
xmlns:uri1="uri:subscribenet.intraware.com">
        <uri1:Host xsi:type="uri1:FNEServerReference">
            <uri1:ID>AS_FNEServer_3</uri1:ID>
            <uri1:IntrawareID>1489</uri1:IntrawareID>
            <uri1:HostIDType>ETHERNET</uri1:HostIDType>
        </uri1:Host>
        <uri1:AddOnCounts>
            <uri1:AddOn xsi:type="uri1:AddOn">
                <uri1:ActivationCode>0F30-6797-AA77-B685</uri1:ActivationCode>
                <uri1:Count>10</uri1:Count>
            </uri1:AddOn>
        </uri1:AddOnCounts>
        <uri1:Reset>FALSE</uri1:Reset>
     </SubscribeNetObject>
      </uri:Update>
   </soapenv:Body>
</soapenv:Envelope>
```

Update Device – Map AddOns

(When add-ons are first mapped, use Associate AddOns call. For subsequent mapping of addons to the same device, use this call)

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Update xmlns="uri:webservice.subscribenet.intraware.com">
     <SubscribeNetObject xsi:type="uri1:FNEHostAddOnCounts"
xmlns:uri1="uri:subscribenet.intraware.com">
        <uri1:Host xsi:type="uri1:DeviceReference">
            <uri1:ID>Dev02</uri1:ID>
            <uri1:HostIDType>FLEXID10</uri1:HostIDType>
            <uri1:PublisherName>hwclient</uri1:PublisherName>
        </uri1:Host>
        <uri1:AddOnCounts>
            <uri1:AddOn xsi:type="uri1:AddOn">
                <uri1:ActivationCode>7B99-E6B9-8646-6BE6</uri1:ActivationCode>
                <uri1:Count>5</uri1:Count>
            </uri1:AddOn>
        </uri1:AddOnCounts>
        <uri1:Reset>FALSE</uri1:Reset>
     </SubscribeNetObject>
      </uri:Update>
   </soapenv:Body>
</soapenv:Envelope>
```

Update FNE Trusted Storage - Server

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xs="http://www.w3.org/2001/XMLSchema">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <uri:Update xmlns="uri:webservice.subscribenet.intraware.com">
         <SubscribeNetObject xsi:type="uri1:FNEHostTrustedStorage"
xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Host xsi:type="uri1:FNEServerReference">
                <uri1:IntrawareID>1480</uri1:IntrawareID>
            </uri1:Host>
            <uri1:Request xsi:type="xs:base64Binary">AAAA+AAAhir/////
AAAACwABAAAAAAIAAAAoAK0FAAAACwCuAAAAAAQAAAALAK8AAAAABQAAAAsAsAAAAAAAAAAACwDKAAAAAAUAAAAPAAcCZm5lZGVtbwA
AAAALAFwAUAcCygAAAAsAXQAAAAAAAAAAFgBNAkFTX0ZORVNlcnZlcl8xAAAAAAsApgAAAAADAAAACwDOAAAAAAAAAAALANIAAAAAAQ
AAAA8AgAJmbmVkZW1vAAAAAEMAagUAAAALAGwAAAAABQAAAAsAkgAAAAACAAAACwBTAAAAAAAAAAAbAGsL8CgcdWnIqeBKFQkUsDYRh
E0SJoU=</uri1:Request>
         </SubscribeNetObject>
</uri:Update>
   </soapenv:Body>
</soapenv:Envelope>
```

Request is base64 encoding of request.bin file. Follow these steps to generate the binary and base64 encoding

These commands require FNE Toolkit to be installed. The toolkit can be obtained from (\\nfs\fnebuild\release\4.6.0). Extract the toolkit to local drive. Execute the following commands from \bin\tools folder.

- Generate request.bin file

  ```
  caprequestutil.bat -id IdentityClient.bin -idtype ServerIDType -device ServerID -server request.bin
  ```

- Convert request.bin into base64 binary

  ```
  printbin -base64 request.bin
  ```

Update FNE Trusted Storage - Device

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xs="http://www.w3.org/2001/XMLSchema">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <uri:Update xmlns="uri:webservice.subscribenet.intraware.com">
```

```
         <SubscribeNetObject xsi:type="uri1:FNEHostTrustedStorage"
xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Host xsi:type="uri1:DeviceReference">
                <uri1:ID>Dev02</uri1:ID>
                <uri1:PublisherName>hwclient</uri1:PublisherName>
                <uri1:HostIDType>FLEXID10</uri1:HostIDType>
            </uri1:Host>
         </SubscribeNetObject>
</uri:Update>
   </soapenv:Body>
</soapenv:Envelope>
```

Update Device Owner

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
 <uri:Update xmlns="uri:webservice.subscribenet.intraware.com">
     <SubscribeNetObject xsi:type="uri1:FNEHostOwner" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference xsi:type="uri1:DeviceReference">
                <uri1:ID>Dev01</uri1:ID>
                <uri1:PublisherName>hwclient</uri1:PublisherName>
                <uri1:HostIDType>FLEXID9</uri1:HostIDType>
            </uri1:Reference>
            <uri1:Owner>
                <uri1:ID>AS_AddOnAccount</uri1:ID>
                <uri1:IntrawareID>35207123</uri1:IntrawareID>
            </uri1:Owner>
     </SubscribeNetObject>
      </uri:Update>
   </soapenv:Body>
</soapenv:Envelope>
```

Update Server Owner

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
      <uri:OptionsHeader/>
   </soapenv:Header>
   <soapenv:Body>
 <uri:Update xmlns="uri:webservice.subscribenet.intraware.com">
     <SubscribeNetObject xsi:type="uri1:FNEHostOwner" xmlns:uri1="uri:subscribenet.intraware.com">
```

```
            <uri1:Reference xsi:type="uri1:FNEServerReference">
                <uri1:ID>ServerID</uri1:ID>
                <uri1:PublisherName>PublisherName</uri1:PublisherName>
                <uri1:HostIDType>ServerIDType</uri1:HostIDType>
                <!--uri1:IntrawareID>intrawareID</uri1:IntrawareID-->
            </uri1:Reference>
            <uri1:Owner>
                <uri1:ID>AccountID</uri1:ID>
            </uri1:Owner>
     </SubscribeNetObject>
      </uri:Update>
   </soapenv:Body>
</soapenv:Envelope>
```

Update Device License File

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
    <soapenv:Header>
         <uri:SessionHeader>
                 <uri:SessionID></uri:SessionID>
          </uri:SessionHeader>
       </soapenv:Header>
       <soapenv:Body>
         <uri:Update xmlns="uri:webservice.subscribenet.intraware.com">
             <SubscribeNetObject xsi:type="uri1:DeviceLicenseFile"
xmlns:uri1="uri:subscribenet.intraware.com">
                  <uri1:Reference xsi:type="uri1:DeviceLicenseFileReference">
                       <uri1:ID>AS_WSDev_03</uri1:ID>
                       <uri1:PublisherName>fnedemo</uri1:PublisherName>
                       <uri1:HostIDType>STRING</uri1:HostIDType>
                </uri1:Reference>
             </SubscribeNetObject>
          </uri:Update>
      </soapenv:Body>
</soapenv:Envelope>
```

Associate Requests

- Associate AddOns - Server
- Associate AddOns - Device

Associate AddOns - Server

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
```

```
            <uri:SessionID></uri:SessionID>
         </uri:SessionHeader>
      </soapenv:Header>
      <soapenv:Body>
         <uri:Associate xmlns="uri:webservice.subscribenet.intraware.com">
               <uri1:SubscribeNetObjectReference xsi:type="uri1:FNEServerReference"
xmlns:uri1="uri:subscribenet.intraware.com">
                  <uri1:ID>AS_FNEServer_1</uri1:ID>
                  <uri1:PublisherName>fnedemo</uri1:PublisherName>
                  <uri1:HostIDType>ETHERNET</uri1:HostIDType>
                  </uri1:SubscribeNetObjectReference>
                          <uri1:SubscribeNetObjectReferenceAss xsi:type="uri1:AddOnCounts">
                  <uri1:AddOn xsi:type="uri1:AddOn">
                      <uri1:ActivationCode>0F30-6797-AA77-B685</uri1:ActivationCode>
                      <uri1:Count>15</uri1:Count>
                  </uri1:AddOn>
                  </uri1:SubscribeNetObjectReferenceAss>
         </uri:Associate>
      </soapenv:Body>
</soapenv:Envelope>
```

Associate AddOns - Device

```
(To associate AddOns for the first time, use this request)
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Associate xmlns="uri:webservice.subscribenet.intraware.com">
            <uri1:SubscribeNetObjectReference xsi:type="uri1:DeviceReference"
xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:ID>Dev01</uri1:ID>
                <uri1:PublisherName>fnedemo</uri1:PublisherName>
                <uri1:HostIDType>ETHERNET</uri1:HostIDType>
                </uri1:SubscribeNetObjectReference>
                <uri1:SubscribeNetObjectReferenceAss xsi:type="uri1:AddOnCounts">
                <uri1:AddOn xsi:type="uri1:AddOn">
                    <uri1:ActivationCode>C4E7-9B68-6E26-D1B2</uri1:ActivationCode>
                    <uri1:Count>2</uri1:Count>
                </uri1:AddOn>
                </uri1:SubscribeNetObjectReferenceAss>
      </uri:Associate>
   </soapenv:Body>
</soapenv:Envelope>
```

Disassociate Requests

- Disassociate AddOns - Server

- Disassociate AddOns - Device

Disassociate AddOns - Server

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
         <uri:Disassociate xmlns="uri:webservice.subscribenet.intraware.com">
            <uri1:SubscribeNetObjectReference xsi:type="uri1:FNEServerReference"
xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:ID>AS_FNEServer_1</uri1:ID>
                <uri1:PublisherName>fnedemo</uri1:PublisherName>
                <uri1:HostIDType>ETHERNET</uri1:HostIDType>
                </uri1:SubscribeNetObjectReference>
                        <uri1:SubscribeNetObjectReferenceAss xsi:type="uri1:AddOnCounts">
                <uri1:AddOn xsi:type="uri1:AddOn">
                    <uri1:ActivationCode>0F30-6797-AA77-B685</uri1:ActivationCode>
                    <uri1:Count>15</uri1:Count>
                </uri1:AddOn>
                </uri1:SubscribeNetObjectReferenceAss>
          </uri:Disassociate>
   </soapenv:Body>
</soapenv:Envelope>
```

Disassociate AddOns - Device

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
      <soapenv:Body>
      <uri:Disassociate xmlns="uri:webservice.subscribenet.intraware.com">
            <uri1:SubscribeNetObjectReference xsi:type="uri1:DeviceReference"
xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:ID>Dev01</uri1:ID>
                <uri1:PublisherName>hwclient</uri1:PublisherName>
                <uri1:HostIdType>ETHERNET</uri1:HostIDType>
                    </uri1:SubscribeNetObjectReference>
                    <uri1:SubscribeNetObjectReferenceAss xsi:type="uri1:AddOnCounts">
                <uri1:AddOn xsi:type="uri1:AddOn">
                    <uri1:ActivationCode>50C4-CDBE-C7AD-0523</uri1:ActivationCode>
                    <uri1:Count>2</uri1:Count>
```

```
                </uri1:AddOn>
             </uri1:SubscribeNetObjectReferenceAss>
      </uri:Disassociate>
   </soapenv:Body>
</soapenv:Envelope>
```

Move Device

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"  xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID>6ababf72-d22d-44fa-b710-5c8457e20beahtfBaMWn/
gVuydvprAk583Y2Spob0raQ4FXGO3YTxsT1</uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:MoveDevice xmlns="uri:webservice.subscribenet.intraware.com">
         <uri:SubscribeNetObject xsi:type="uri1:MoveDevice"
xmlns:uri1="uri:subscribenet.intraware.com">
             <uri1:MoveDeviceReference xsi:type="uri1:DeviceReference">
              <uri1:ID xsi:type="xsd:string">FlexeraQADevice4</uri1:ID>
              <uri1:PublisherName xsi:type="xsd:string">fnedemo</uri1:PublisherName>
              <uri1:HostIDType xsi:type="xsd:string">STRING</uri1:HostIDType>
            </uri1:MoveDeviceReference>
         </uri:SubscribeNetObject>
         <uri:SubscribeNetObjectReference xsi:type="uri2:AccountReference"
xmlns:uri2="uri:subscribenet.intraware.com">
                 <!-- Specify the Device Owner Account here, either the Account ID or System Account ID
-->
                 <uri2:ID>FlexQAESDSourceAccount</uri2:ID>
          </uri:SubscribeNetObjectReference>
         <uri:SubscribeNetObjectReferenceAss xsi:type="uri3:AccountNoShareIDReference"
xmlns:uri3="uri:subscribenet.intraware.com">
              <!-- Specify the new account that should own the device after move -->
              <uri3:ID>FlexeraQATargetAccount</uri3:ID>
         </uri:SubscribeNetObjectReferenceAss>
      </uri:MoveDevice>
   </soapenv:Body>
</soapenv:Envelope>
```

Move Server

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"  xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID>12bc5c1e-92a6-4838-acc5-28a0f256035eYDn9zcg5IPxD6hq8NzfV8E3dG4rrpJZrRPKRzQU=</
uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
```

```
      <uri:MoveServer xmlns="uri:webservice.subscribenet.intraware.com">
         <uri:SubscribeNetObject xsi:type="uri1:MoveDevice"
xmlns:uri1="uri:subscribenet.intraware.com">
             <uri1:MoveDeviceReference xsi:type="uri1:DeviceReference">
              <uri1:ID xsi:type="xsd:string">FlexeraQATestServer0422</uri1:ID>
              <uri1:PublisherName xsi:type="xsd:string">fnedemo</uri1:PublisherName>
              <uri1:HostIDType xsi:type="xsd:string">ETHERNET</uri1:HostIDType>
            </uri1:MoveDeviceReference>
         </uri:SubscribeNetObject>
         <uri:SubscribeNetObjectReference xsi:type="uri1:AccountReference"
xmlns:uri2="uri:subscribenet.intraware.com">
                       <!-- Specify the Server Owner Account here, either the Account ID or System
Account ID -->
                       <!--uri1:IntrawareID>35412913</uri1:IntrawareID-->
                       <uri2:ID>AS_AddOnAccount</uri2:ID>
          </uri:SubscribeNetObjectReference>
         <uri:SubscribeNetObjectReferenceAss xsi:type="uri1:AccountNoShareIDReference"
xmlns:uri3="uri:subscribenet.intraware.com">
              <!-- Specify the new account that should own the server after move -->
              <uri1:ID>AS_TargetAccount</uri1:ID>
              <!--uri1:IntrawareID>35412913</uri1:IntrawareID-->
         </uri:SubscribeNetObjectReferenceAss>
      </uri:MoveServer>
   </soapenv:Body>
</soapenv:Envelope>
```

Return Device

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
        <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <uri:ReturnDevice xmlns="uri:webservice.subscribenet.intraware.com">
        <SubscribeNetObject xsi:type="uri1:ReturnDevice" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:ReturnDeviceReference xsi:type="uri1:DeviceReference">
                <uri1:ID>AS_Dev0_10206</uri1:ID>
                <uri1:PublisherName>fnedemo</uri1:PublisherName>
                <uri1:HostIDType>ETHERNET</uri1:HostIDType>
            </uri1:ReturnDeviceReference>
          <uri1:Rma>RMA100602</uri1:Rma>
            <!--<uri1:TargetDeviceReference xsi:type="uri1:DeviceReference">
                <uri1:ID></uri1:ID>
                <uri1:PublisherName></uri1:PublisherName>
                <uri1:HostIDType></uri1:HostIDType>
            </uri1:TargetDeviceReference> -->
        </SubscribeNetObject>
      </uri:ReturnDevice>
   </soapenv:Body>
</soapenv:Envelope>
```

Get Requests

This section describes the **Get Requests** API operation.

- Login (Get Requests)
- Get License Token
- Get Order Line
- Get Order - using Activation Code
- Get Account
- Get Member
- Get CatalogItem

Login (Get Requests)

Note ▪ *The login call needs to be executed to obtain the session ID for all other SOAP calls.*

Important ▪ *Change PartnerCode to the specific partner where the SOAP call is intended to be run.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header/>
   <soapenv:Body>
      <uri:Login>
         <uri:Username>system@example.com</uri:Username>
         <uri:Password>password1</uri:Password>
         <uri:PartnerCode>TEST</uri:PartnerCode>
      </uri:Login>
   </soapenv:Body>
</soapenv:Envelope>
```

Get License Token

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Get>
         <uri1:SubscribeNetObjectReference xsi:type="uri1:LicenseTokenReference"
xmlns:uri1="uri:subscribenet.intraware.com">
          <uri1:ID></uri1:ID>
          <uri1:IntrawareID></uri1:IntrawareID>
```

```
      </uri1:SubscribeNetObjectReference>
       </uri:Get>
    </soapenv:Body>
</soapenv:Envelope>
```

Get Order Line

Note ▪ *Use Line Number along with System Order ID and/or Order ID to get the order line information.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Get xmlns="uri:subscribenet.intraware.com">
           <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="OrderLineReference">
         <uri1:IntrawareID>SystemEntitlementID</uri1:IntrawareID>
       <!-- AND/OR -->
         <uri1:ID>EntitlementID</uri1:ID>
         <uri1:LineNumber>linenumber</uri1:LineNumber>
           </uri:SubscribeNetObjectReference>
       </uri:Get>
   </soapenv:Body>
</soapenv:Envelope>
```

Get Order - using Activation Code

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID>Session ID</uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Get xmlns="uri:subscribenet.intraware.com">
           <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="OrderActivationCodeReference">
              <!-- OPTIONAL -->
               <!-- <uri1:ID>EntitlementID</uri1:ID>
               <uri1:IntrawareID>SystemEntitlementID</uri1:IntrawareID> -->
             <uri1:ActivationCode>ActivationCode</uri1:ActivationCode>
           </uri:SubscribeNetObjectReference>
       </uri:Get>
   </soapenv:Body>
</soapenv:Envelope>
```

Get Account

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
    <soapenv:Header>
         <uri:SessionHeader>
             <uri:SessionID>810651c9-e779-4a2b-a63f-e383c6622dadLRWxuVlu6r2OeiGUDU3lPQBEkE=</
uri:SessionID>
         </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
           <uri:Get xmlns="uri:subscribenet.intraware.com">
                   <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xsi:type="AccountReference">
                             <uri1:ID xsi:type="xsd:string">AS_AddOnAccount</uri1:ID>
                   </uri:SubscribeNetObjectReference>
           </uri:Get>
    </soapenv:Body>
</soapenv:Envelope>
```

Get Member

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Get xmlns="uri:subscribenet.intraware.com">
        <uri:SubscribeNetObjectReference xsi:type="uri1:MemberReference"
xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:AccountReference xsi:type="uri1:AccountReference">
                <uri1:IntrawareID>SystemAccountID</uri1:IntrawareID>
            </uri1:AccountReference>
<!-- If Account does not have an Account ID, use System Member ID -->
            <uri1:IntrawareID>SystemMemberID</uri1:IntrawareID>
            <uri1:ID xsi:type="xsd:string">MemberID</uri1:ID>
<!--    OPTIONAL  -->
             <uri1:Email xsi:type="xsd:string">Email</uri1:Email> -->
         </uri:SubscribeNetObjectReference>
       </uri:Get>
  </soapenv:Body>
</soapenv:Envelope>
```

Get CatalogItem

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
    <soapenv:Header>
```

```
        <uri:SessionHeader>
            <uri1:SessionID></uri1:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <uri:Get xmlns="uri:subscribenet.intraware.com">
            <uri1:SubscribeNetObjectReference xsi:type="uri1:CatalogItemReference"
xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:IntrawareID>123456789</uri1:IntrawareID>
                <!--uri1:ID>1e3ce632-6784-4735-8a71-b819928415f8</uri1:ID-->
            </uri1:SubscribeNetObjectReference>
        </uri:Get>
    </soapenv:Body>
</soapenv:Envelope>
```

License Requests

This section describes the **License Requests** API operation.

- Generate Licenses (FNP Certificate Only)
- Find Licenses
- Return Licenses
- Rehost Licenses
- Retrieve Licenses From FNOC Pool

Generate Licenses (FNP Certificate Only)

- Node License
- Server License
- Lexmark License
- Paccar License
- IXIA BreakingPoint License

Node License

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://
www.w3.org/2001/XMLSchema-instance"  xmlns:uri="uri:webservice.subscribenet.intraware.com">
    <soapenv:Header>
        <uri:SessionHeader>
            <uri:SessionID></uri:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <uri:GenerateLicense xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri1="uri:subscribenet.intraware.com"  xsi:type="GenerateLicense">
                <uri1:ActivationCode>5E8E-8EE0-70B4-A3BB</uri1:ActivationCode>
```

```
                <uri1:LicenseQuantity>1</uri1:LicenseQuantity>
                <uri1:ProductID>LXKI_Node_Product_01</uri1:ProductID>
                <uri1:OverDraftQuantity>11</uri1:OverDraftQuantity>
                <uri1:IssueDate xsi:type="xs:date">2012-01-05></uri1:IssueDate>
                <uri1:FlexTmplNodeLicense xmlns="uri:subscribenet.intraware.com">
                    <uri1:NodeHostIdType>HST_TYP_ETHER</uri1:NodeHostIdType>
                    <uri1:NodeHostId>11223388</uri1:NodeHostId>
                    <uri1:NodeHostDscr>TestHost</uri1:NodeHostDscr>
                    <uri1:NodeHostName>Example11223388</uri1:NodeHostName>
                    <uri1:NodeHostQuantity>1</uri1:NodeHostQuantity>
                </uri1:FlexTmplNodeLicense>
            </uri:SubscribeNetObjectReference>
        </uri:GenerateLicense>
    </soapenv:Body>
</soapenv:Envelope>
```

Server License

Note ▪ *Activation Code is optional. Only for Certificate licenses.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://
www.w3.org/2001/XMLSchema-instance"  xmlns:uri="uri:webservice.subscribenet.intraware.com">
    <soapenv:Header>
        <uri:SessionHeader>
            <uri:SessionID></uri:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <uri:GenerateLicense xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri1="uri:subscribenet.intraware.com"  xsi:type="GenerateLicense">
<!--                 <uri1:ActivationCode>31BF-B46A-59A6-E529</uri1:ActivationCode>  -->
                <uri1:OrderID>AS_TestOrder_02</uri1:OrderID>
                <uri1:LineNumber>1</uri1:LineNumber>
                <uri1:ProductID>Agilent_GC</uri1:ProductID>
                <uri1:LicenseQuantity>1</uri1:LicenseQuantity>
                <uri1:IssueDate xsi:type="xs:date">2012-03-15</uri1:IssueDate>
                <uri1:FlexTmplServerLicense xmlns="uri:subscribenet.intraware.com">
                    <uri1:ServerHostIdType0>HST_TYP_ETHER</uri1:ServerHostIdType0>
                    <uri1:ServerHostId0>1111111111</uri1:ServerHostId0>
                    <uri1:ServerHostDscr0>Server1111111111</uri1:ServerHostDscr0>
                    <uri1:ServerHostName0>Server1111111111</uri1:ServerHostName0>
                    <uri1:ServerHostPort0>8080</uri1:ServerHostPort0>
                    <uri1:ServerHostIdType1>HST_TYP_ETHER</uri1:ServerHostIdType1>
                    <uri1:ServerHostId1>2222222222</uri1:ServerHostId1>
                    <uri1:ServerHostDscr1>Server2222222222</uri1:ServerHostDscr1>
                    <uri1:ServerHostName1>Server2222222222</uri1:ServerHostName1>
                    <uri1:ServerHostPort1>8081</uri1:ServerHostPort1>
                    <uri1:ServerHostIdType2>HST_TYP_ETHER</uri1:ServerHostIdType2>
                    <uri1:ServerHostId2>3333333333</uri1:ServerHostId2>
                    <uri1:ServerHostDscr2>Server3333333333</uri1:ServerHostDscr2>
                    <uri1:ServerHostName2>Server3333333333</uri1:ServerHostName2>
                    <uri1:ServerHostPort2>8082</uri1:ServerHostPort2>
```

```
                </uri1:FlexTmplServerLicense>
            </uri:SubscribeNetObjectReference>
        </uri:GenerateLicense>
    </soapenv:Body>
</soapenv:Envelope>
```

Lexmark License

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://
www.w3.org/2001/XMLSchema-instance" xmlns:uri="uri:webservice.subscribenet.intraware.com">
    <soapenv:Header>
        <uri:SessionHeader>
            <uri:SessionID></uri:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <uri:GenerateLicense xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri1="uri:subscribenet.intraware.com" xsi:type="GenerateLicense">
                <uri1:ActivationCode>5C68-CBAA-8961-A23C</uri1:ActivationCode>
                <uri1:LicenseQuantity>520</uri1:LicenseQuantity>
                <uri1:ProductID>82M0903-001</uri1:ProductID>
                <!--<uri1:OverDraftQuantity>11</uri1:OverDraftQuantity>-->
                <uri1:IssueDate xsi:type="xs:date">2012-07-16></uri1:IssueDate>
                <uri1:LexmarkLicense xmlns="uri:subscribenet.intraware.com">
                    <uri1:requestId>Req11223321</uri1:requestId>
                    <uri1:NodeHostId>11223321</uri1:NodeHostId>
                </uri1:LexmarkLicense>
            </uri:SubscribeNetObjectReference>
        </uri:GenerateLicense>
    </soapenv:Body>
</soapenv:Envelope>
```

Paccar License

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://
www.w3.org/2001/XMLSchema-instance" xmlns:uri="uri:webservice.subscribenet.intraware.com">
    <soapenv:Header>
        <uri:SessionHeader>
            <uri:SessionID></uri:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <uri:GenerateLicense xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri1="uri:subscribenet.intraware.com" xsi:type="GenerateLicense">
<!--                <uri1:ActivationCode>F0D1-C689-1EAD-35A0</uri1:ActivationCode> -->
                <uri1:OrderID>AS_PaccarOrder_01</uri1:OrderID>
                <uri1:LineNumber>1</uri1:LineNumber>
                <uri1:LicenseQuantity>1</uri1:LicenseQuantity>
                <uri1:IssueDate xsi:type="xs:date">2012-09-12></uri1:IssueDate>
                <uri1:PaccarLicense xmlns="uri:webservice.subscribenet.intraware.com">
                    <uri1:LicenseHostID>20120912</uri1:LicenseHostID>
                    <uri1:LicenseHostName>AS_LicenseHost</uri1:LicenseHostName>
```

```
                </uri1:PaccarLicense>
            </uri:SubscribeNetObjectReference>
        </uri:GenerateLicense>
    </soapenv:Body>
</soapenv:Envelope>
```

IXIA BreakingPoint License

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
    <soapenv:Header>
        <SessionHeader>
            <uri:SessionID xmlns:uri="uri:webservice.subscribenet.intraware.com">session ID from login
response</uri:SessionID>
        </SessionHeader>
        <OptionsHeader>
            <uri:OrderEmailDirective>DEFAULT</uri:OrderEmailDirective>
            <uri:OrderEmailVariation>DEFAULT</uri:OrderEmailVariation>
        </OptionsHeader>
    </soapenv:Header>
    <soapenv:Body>
        <AddUpdate xmlns="uri:webservice.subscribenet.intraware.com">
            <SubscribeNetObject xsi:type="uri1:Order" xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:Reference xsi:type="uri1:OrderReference">
                    <uri1:ID xsi:type="uri1:string">BreakingPoint_Order01</uri1:ID>
                </uri1:Reference>
                <uri1:Account xsi:type="uri1:AccountReference">
                    <uri1:IntrawareID>35219323</uri1:IntrawareID>
                </uri1:Account>
                <uri1:OrderDate xsi:type="xs:date">2013-01-09</uri1:OrderDate>
                <uri1:PurchaseOrderID xsi:type="xsd:string">BreakingPoint_Order01</
uri1:PurchaseOrderID>
                <uri1:SalesRep>Online Order</uri1:SalesRep>
                <uri1:InvoiceID xsi:type="xsd:string">BreakingPoint_Order01</uri1:InvoiceID>
                <uri1:InvoiceDate xsi:type="xs:date">2013-01-09</uri1:InvoiceDate>
                <uri1:OrderNote>Order for Ixia Breaking Point License Issuer</uri1:OrderNote>
                <uri1:OrderLine xsi:type="uri1:OrderLine">
                    <uri1:LineNumber>1</uri1:LineNumber>
                    <uri1:SKU>IxiaBreakingPointCatalog_01</uri1:SKU>
                    <uri1:Quantity>1</uri1:Quantity>
                </uri1:OrderLine>
                <uri1:UserDefinedField code="HOST_ID">Example-Host</uri1:UserDefinedField>
                <uri1:UserDefinedField code="HOST_NAME">WebServicesHost1122334466</
uri1:UserDefinedField>
                <uri1:TO>system@example.com</uri1:TO>
            </SubscribeNetObject>
        </AddUpdate>
    </soapenv:Body>
</soapenv:Envelope>
```

Find Licenses

- Find Node Licenses

- Find License by License ID
- Find Server License

Find Node Licenses

To find licenses by Activation Code:

```
Pass Activation Code and Account ID parameters. All other parameters are not necessary
```

To find licenses by Order ID:

```
Pass Order ID along with Account ID
```

To find licenes for an order line:

```
Pass Order ID, Account ID, ProductID, Line Number
```

To find licenses by Host:

```
Pass Account ID, Order ID, HostID
```

Find license by License ID:

```
It is also possible to find licenses by License ID. The next request explains this in detail.

<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com"  xmlns:uri1="uri:subscribenet.intraware.com">
    <soapenv:Header>
        <uri:SessionHeader>
                 <uri:SessionID></uri:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <uri:Find xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="LicenseReference">
                <uri1:ActivationCode>233F-FFF1-6204-0674</uri1:ActivationCode>
                <uri1:AccountID>webservice1201</uri1:AccountID>
                <uri1:OrderID>webservice-node1201</uri1:OrderID>
                <uri1:ProductID>LXKI_Node_Product</uri1:ProductID>
                <uri1:LineNumber>1</uri1:LineNumber>
                <uri1:HostID>Example11223344</uri1:HostID>
                <uri1:IncludeLicenseFile>True</uri1:IncludeLicenseFile>
            </uri:SubscribeNetObjectReference>
        </uri:Find>
    </soapenv:Body>
</soapenv:Envelope>
```

Find License by License ID

The License ID can be obtained from the Reference ID tag in the soap response for Generate License. Another way to obtain license ID is to find the license using Activation Code or Order ID. The soap response will contain the Reference ID.

After the implementation of Bug 15062, partner code validation is in place - the session ID used in the Find License call must match the session ID of the partner to whom the license belongs.

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
    <soapenv:Header>
        <uri:SessionHeader>
            <uri:SessionID></uri:SessionID>
```

```
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <uri:Find xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="LicenseReference">
                    <uri1:ID>39644283</uri1:ID>
            </uri:SubscribeNetObjectReference>
        </uri:Find>
    </soapenv:Body>
</soapenv:Envelope>
```

Find Server License

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com"  xmlns:uri1="uri:subscribenet.intraware.com">
    <soapenv:Header>
        <uri:SessionHeader>
            <uri:SessionID></uri:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
<uri:Find xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="LicenseReference">
                <uri1:AccountID>webservice1201</uri1:AccountID>
                <uri1:OrderID>webservice-server1201</uri1:OrderID>
                <uri1:ProductID>LXKI_Server_Product_01</uri1:ProductID>
                <uri1:LineNumber>1</uri1:LineNumber>
            </uri:SubscribeNetObjectReference>
        </uri:Find>
    </soapenv:Body>
</soapenv:Envelope>
```

Return Licenses

- Both Node and Server

Both Node and Server

The License ID can be obtained from the Reference ID tag in the soap response for Generate License.

Another way to obtain license ID is to find the license using Activation Code or Order ID. The soap response will contain the Reference ID.

Partner code validation is in place - apart from the correct session ID, need to pass both Activation Code and Order ID in order to ensure that the license for another partner is not returned inadvertently.

Note ▪ *Return is only for Certificate licenses.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com"  xmlns:uri1="uri:subscribenet.intraware.com">
```

```
    <soapenv:Header>
        <uri:SessionHeader>
            <uri:SessionID></uri:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <uri:ReturnLicense xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:type="LicenseReference">
                <uri1:ActivationCode></uri1:ActivationCode>
                <uri1:OrderID></uri1:OrderID>
                <uri1:ID></uri1:ID>
            </uri:SubscribeNetObjectReference>
        </uri:ReturnLicense>
    </soapenv:Body>
</soapenv:Envelope>
```

Rehost Licenses

- Node License
- Server License

Node License

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://
www.w3.org/2001/XMLSchema-instance"  xmlns:uri="uri:webservice.subscribenet.intraware.com">
    <soapenv:Header>
        <uri:SessionHeader>
            <uri:SessionID></uri:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <uri:RehostLicense xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri1="uri:subscribenet.intraware.com"  xsi:type="RehostLicense">
                <uri1:LicenseID>37771951</uri1:LicenseID>
                <uri1:FlexTmplNodeLicense xmlns="uri:subscribenet.intraware.com">
                    <uri1:NodeHostIdType>HST_TYP_ETHER</uri1:NodeHostIdType>
                    <uri1:NodeHostId>11223388</uri1:NodeHostId>
                    <uri1:NodeHostDscr>TestHost</uri1:NodeHostDscr>
                    <uri1:NodeHostName>Example11223388</uri1:NodeHostName>
                    <uri1:NodeHostQuantity>1</uri1:NodeHostQuantity>
                </uri1:FlexTmplNodeLicense>
            </uri:SubscribeNetObjectReference>
        </uri:RehostLicense>
    </soapenv:Body>
</soapenv:Envelope>
```

Server License

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://
www.w3.org/2001/XMLSchema-instance"  xmlns:uri="uri:webservice.subscribenet.intraware.com">
```

```
    <soapenv:Header>
        <uri:SessionHeader>
            <uri:SessionID></uri:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <uri:RehostLicense xmlns="uri:subscribenet.intraware.com">
            <uri:SubscribeNetObjectReference xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri1="uri:subscribenet.intraware.com"  xsi:type="RehostLicense">
                <uri1:LicenseID>37771960</uri1:LicenseID>
                <uri1:FlexTmplServerLicense xmlns="uri:subscribenet.intraware.com">
                    <uri1:ServerHostIdType0>HST_TYP_ETHER</uri1:ServerHostIdType0>
                    <uri1:ServerHostId0>4444444444</uri1:ServerHostId0>
                    <uri1:ServerHostDscr0>Server4444444444</uri1:ServerHostDscr0>
                    <uri1:ServerHostName0>Server4444444444</uri1:ServerHostName0>
                    <uri1:ServerHostPort0>8080</uri1:ServerHostPort0>
                    <uri1:ServerHostIdType1>HST_TYP_ETHER</uri1:ServerHostIdType1>
                    <uri1:ServerHostId1>5555555555</uri1:ServerHostId1>
                    <uri1:ServerHostDscr1>Server5555555555</uri1:ServerHostDscr1>
                    <uri1:ServerHostName1>Server5555555555</uri1:ServerHostName1>
                    <uri1:ServerHostPort1>8081</uri1:ServerHostPort1>
                    <uri1:ServerHostIdType2>HST_TYP_ETHER</uri1:ServerHostIdType2>
                    <uri1:ServerHostId2>6666666666</uri1:ServerHostId2>
                    <uri1:ServerHostDscr2>Server6666666666</uri1:ServerHostDscr2>
                    <uri1:ServerHostName2>Server6666666666</uri1:ServerHostName2>
                    <uri1:ServerHostPort2>8082</uri1:ServerHostPort2>
                </uri1:FlexTmplServerLicense>
            </uri:SubscribeNetObjectReference>
        </uri:RehostLicense>
    </soapenv:Body>
</soapenv:Envelope>
```

Retrieve Licenses From FNOC Pool

```
Endpoint: http://managerqa1.isys.intraware.com:80/service/snetmgr/services/License
WSDL: http://managerqa1.isys.intraware.com/service/snetmgr/services/License?wsdl
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.license.subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID>e6bb804c-81ef-4b30-8c21-b0b7163a0ad1afwn1aYWYL8Px3Mai3rhJdI5jailVhFV</
uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:GetEntitlementKeyFromPool>
         <uri:ActivationCode>1d86-ff60-a884-42e0-b09e-ed83-a695-2365</uri:ActivationCode>
         <uri:Quantity>2</uri:Quantity>
         <uri:PartnerCode>TEST</uri:PartnerCode>
      </uri:GetEntitlementKeyFromPool>
   </soapenv:Body>
</soapenv:Envelope>
```

Merge Account

This section describes the **Merge Account** API operation.

- Login (Merge Account)
- Merge Account

Note ▪ *Execute the login call to obtain the session ID. Paste the session ID from the Login Response to proceed. Session ID would resemble:*

```
c6f115ca-d46a-4ef5-8c70-2bb9c40faa52DWoR1Bxa3/QWCpaaqMbhO/KVLpN7LSUKT6t66RAL8JijHnUuT/wpHrM=
```

Login (Merge Account)

The login call needs to be executed to obtain the session ID for all other SOAP calls.

Important ▪ *Change PartnerCode to the specific partner where the SOAP call is intended to be run.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header/>
   <soapenv:Body>
      <uri:Login>
         <uri:Username>system@example.com</uri:Username>
         <uri:Password>password1</uri:Password>
         <uri:PartnerCode>TEST</uri:PartnerCode>
      </uri:Login>
   </soapenv:Body>
</soapenv:Envelope>
```

Merge Account

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:OptionsHeader>
      </uri:OptionsHeader>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Merge>
         <uri:SubscribeNetObjectReference xsi:type="uri1:AccountReference"
xmlns:uri1="uri:subscribenet.intraware.com">
            <!--Account that will be merged -->
            <!-- Account ID -->
            <uri1:ID>AS-MergeFromAccount-0202</uri1:ID>
            <!-- System Account ID -->
```

```
            <!--uri1:IntrawareID>?</uri1:IntrawareID>
            <uri1:SharePartnerID>?</uri1:SharePartnerID-->
         </uri:SubscribeNetObjectReference>
         <uri:SubscribeNetObjectReferenceAss xsi:type="uri1:AccountNoShareIDReference">
         <!-- Merge To Account -->
            <!-- Account ID -->
            <uri1:ID>AS-MergeToAccount-0202</uri1:ID>
            <!-- System Account ID -->
            <!--uri1:IntrawareID>?</uri1:IntrawareID-->
         </uri:SubscribeNetObjectReferenceAss>
      </uri:Merge>
   </soapenv:Body>
</soapenv:Envelope>
```

Reidentify

This section describes the **Reidentify** API operation.

- Login (Reidentify)
- Reidentify Member

Note ▪ *Execute the login call to obtain the session ID. Paste the session ID from the Login Response to proceed. Session ID would resemble:*

```
c6f115ca-d46a-4ef5-8c70-2bb9c40faa52DWoR1Bxa3/QWCpaaqMbh0/KVLpN7LSUKT6t66RAL8JijHnUuT/wpHrM=
```

Login (Reidentify)

Note ▪ *The login call needs to be executed to obtain the session ID for all other SOAP calls.*

Important ▪ *Change PartnerCode to the specific partner where the SOAP call is intended to be run.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header/>
   <soapenv:Body>
      <uri:Login>
         <uri:Username>system@example.com</uri:Username>
         <uri:Password>password1</uri:Password>
         <uri:PartnerCode>TEST</uri:PartnerCode>
      </uri:Login>
   </soapenv:Body>
</soapenv:Envelope>
```

Reidentify Member

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
        <uri:OptionsHeader/>
        <uri:SessionHeader>
        <uri:SessionID></uri:SessionID>
        </uri:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <Reidentify xmlns="uri:webservice.subscribenet.intraware.com">
            <SubscribeNetObjectReference xsi:type="ns2:MemberReference"
xmlns:ns2="uri:subscribenet.intraware.com">
                <ns2:ID xsi:type="xsd:string"></ns2:ID>
                <ns2:AccountReference xsi:type="ns2:AccountReference">
                    <ns2:IntrawareID xsi:type="xsd:string"></ns2:IntrawareID>
                </ns2:AccountReference>
            </SubscribeNetObjectReference>
            <NewID></NewID>
        </Reidentify>
    </soapenv:Body>
</soapenv:Envelope>
```

Restrict Product / File

This section describes the **Restrict Product / File** API operation.

- Login (Restrict Product / File)
- Restrict Product to Account
- Restrict File to Account

***Note ▪** Execute the login call to obtain the session ID. Paste the session ID from the Login Response to proceed. Session ID would resemble:*

`c6f115ca-d46a-4ef5-8c70-2bb9c40faa52DWoR1Bxa3/QWCpaaqMbh0/KVLpN7LSUKT6t66RAL8JijHnUuT/wpHrM=`

***Note ▪** Can only associate one entity at a time.*

Login (Restrict Product / File)

***Note ▪** The login call needs to be executed to obtain the session ID for all other SOAP calls.*

***Important ▪** Change PartnerCode to the specific partner where the SOAP call is intended to be run.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header/>
   <soapenv:Body>
      <uri:Login>
         <uri:Username>system@example.com</uri:Username>
         <uri:Password>password1</uri:Password>
         <uri:PartnerCode>TEST</uri:PartnerCode>
      </uri:Login>
   </soapenv:Body>
</soapenv:Envelope>
```

Restrict Product to Account

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Restrict xmlns="uri:webservice.subscribenet.intraware.com">
    <uri1:SubscribeNetObjectReferenceAss xsi:type="uri1:AccountNoShareIDReference"
xmlns:uri1="uri:subscribenet.intraware.com">
        <uri1:IntrawareID>35210413</uri1:IntrawareID>
        <!--uri1:ID></ID-->
    </uri1:SubscribeNetObjectReferenceAss>
         <uri:SubscribeNetObjectReferenceRst xsi:type="uri1:RestrictProductReference"
xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:ID>AS_FlexTemplateProduct_01</uri1:ID>
            <!--uri1:IntrawareID></uri1:IntrawareID-->
       <!-- Allowed codes: Allow: A; Deny: D -->
        <uri1:RestrictCode>A</uri1:RestrictCode>
         </uri:SubscribeNetObjectReferenceRst>
      </uri:Restrict>
   </soapenv:Body>
</soapenv:Envelope>
```

Restrict File to Account

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   <uri:OptionsHeader/></soapenv:Header>
   <soapenv:Body>
      <uri:Restrict xmlns="uri:webservice.subscribenet.intraware.com">
    <uri1:SubscribeNetObjectReferenceAss xsi:type="uri1:AccountNoShareIDReference">
            <uri1:IntrawareID>35210413</uri1:IntrawareID>
```

```
        <!-- <uri1:ID>35254963</uri1:ID> -->
    </uri1:SubscribeNetObjectReferenceAss>
         <uri:SubscribeNetObjectReferenceRst xsi:type="uri1:RestrictFileReference">
            <uri1:IntrawareID>5261063</uri1:IntrawareID>
        <uri1:RestrictCode>D</uri1:RestrictCode>
         </uri:SubscribeNetObjectReferenceRst>
      </uri:Restrict>
   </soapenv:Body>
</soapenv:Envelope>
```

Unrestrict Product / File

This section describes the **Unrestrict Product / File** API operation.

- Login (Unrestrict Product / File)
- Unrestrict Product from Account
- Unrestrict File From Account

***Note** ▪ Execute the login call to obtain the session ID. Paste the session ID from the Login Response to proceed. Session ID would resemble:*

```
c6f115ca-d46a-4ef5-8c70-2bb9c40faa52DWoR1Bxa3/QWCpaaqMbh0/KVLpN7LSUKT6t66RAL8JijHnUuT/wpHrM=)
```

***Note** ▪ Can only associate one entity at a time.*

Login (Unrestrict Product / File)

***Note** ▪ The login call needs to be executed to obtain the session ID for all other SOAP calls.*

***Important** ▪ Change PartnerCode to the specific partner where the SOAP call is intended to be run.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header/>
   <soapenv:Body>
      <uri:Login>
         <uri:Username>system@example.com</uri:Username>
         <uri:Password>password1</uri:Password>
         <uri:PartnerCode>TEST</uri:PartnerCode>
      </uri:Login>
   </soapenv:Body>
</soapenv:Envelope>
```

Unrestrict Product from Account

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Unrestrict xmlns="uri:webservice.subscribenet.intraware.com">
    <uri1:SubscribeNetObjectReferenceAss xsi:type="uri1:AccountNoShareIDReference"
xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:IntrawareID>35210413</uri1:IntrawareID>
    </uri1:SubscribeNetObjectReferenceAss>
         <uri:SubscribeNetObjectReference xsi:type="uri1:ProductReference"
xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:ID>AS_FlexTemplateProduct_01</uri1:ID>
         </uri:SubscribeNetObjectReference>
      </uri:Unrestrict>
   </soapenv:Body>
</soapenv:Envelope>
```

Unrestrict File From Account

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID>4850d702-3f80-4dac-8b1f-b9ea0544f07dGEZmvhaDo4YZt/
Ddmg72U3a4KxBwVwNvNwBcyZuz5mtJ4OB4=</uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Unrestrict xmlns="uri:webservice.subscribenet.intraware.com">
    <uri1:SubscribeNetObjectReferenceAss xsi:type="uri1:AccountNoShareIDReference"
xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:IntrawareID>35210413</uri1:IntrawareID>
    </uri1:SubscribeNetObjectReferenceAss>
         <uri:SubscribeNetObjectReference xsi:type="uri1:FileReference"
xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:IntrawareID>5240093</uri1:IntrawareID>
         </uri:SubscribeNetObjectReference>
      </uri:Unrestrict>
   </soapenv:Body>
</soapenv:Envelope>
```

Transfer Order

This section describes the **Transfer Order** API operation.

-

- Login (Transfer Order)
- Transfer Order

Note* ▪ *Execute the login call to obtain the session ID. Paste the session ID from the Login Response to proceed. Session ID would resemble:

```
c6f115ca-d46a-4ef5-8c70-2bb9c40faa52DWoR1Bxa3/QWCpaaqMbh0/KVLpN7LSUKT6t66RAL8JijHnUuT/wpHrM=
```

Login (Transfer Order)

Note* ▪ *The login call needs to be executed to obtain the session ID for all other SOAP calls.

Important* ▪ *Change PartnerCode to the specific partner where the SOAP call is intended to be run.

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header/>
   <soapenv:Body>
      <uri:Login>
         <uri:Username>system@example.com</uri:Username>
         <uri:Password>password1</uri:Password>
         <uri:PartnerCode>TEST</uri:PartnerCode>
      </uri:Login>
   </soapenv:Body>
</soapenv:Envelope>
```

Transfer Order

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:uri1="uri:subscribenet.intraware.com">
   <soapenv:Header>
      <uri:SessionHeader>
         <uri:SessionID>fc41cffc-db07-4ec2-9f97-8370ed2e35353viVGd2JvHQd0vwk0Z/
ijVxyOqzrfeevo8U0Am1V3vCt2u4LoBZlCA==</uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:TransferOrder>
         <uri:SubscribeNetObject xsi:type="uri1:Order" xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:Reference xsi:type="uri1:OrderReference">
                    <uri1:ID xsi:type="uri1:string">AS_FNE_ENT-11301</uri1:ID>
                </uri1:Reference>
        </uri:SubscribeNetObject>
         <uri:SubscribeNetObjectReference xsi:type="uri1:AccountReference"
xmlns:uri3="uri:subscribenet.intraware.com">
        <uri1:ID>AS_AddOnAccount</uri1:ID>
         </uri:SubscribeNetObjectReference>
```

```
         <uri:SubscribeNetObjectReferenceAss xsi:type="uri1:AccountNoShareIDReference"
xmlns:uri3="uri:subscribenet.intraware.com">
                <uri1:ID>AS_Account_10142</uri1:ID>
         </uri:SubscribeNetObjectReferenceAss>
      </uri:TransferOrder>
   </soapenv:Body>
</soapenv:Envelope>
```

Update

This section describes the **Update** API operation.

- Login (Update)
- Update Catalog
- Update Product
- Update Order
- Update License Token
- Update Member

***Note** ▪ Execute the login call to obtain the session ID. Paste the session ID from the Login Response to proceed. Session ID would resemble:*

```
c6f115ca-d46a-4ef5-8c70-2bb9c40faa52DWoR1Bxa3/QWCpaaqMbh0/KVLpN7LSUKT6t66RAL8JijHnUuT/wpHrM=
```

Login (Update)

***Note** ▪ The login call needs to be executed to obtain the session ID for all other SOAP calls.*

***Important** ▪ Change PartnerCode to the specific partner where the SOAP call is intended to be run.*

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
   <soapenv:Header/>
   <soapenv:Body>
      <uri:Login>
         <uri:Username>system@example.com</uri:Username>
         <uri:Password>password1</uri:Password>
         <uri:PartnerCode>TEST</uri:PartnerCode>
      </uri:Login>
   </soapenv:Body>
</soapenv:Envelope>
```

Update Catalog

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <uri:Update xmlns="uri:webservice.subscribenet.intraware.com">
         <uri1:SubscribeNetObject xsi:type="uri1:CatalogItem"
xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference xsi:type="uri1:CatalogItemReference">
                <uri1:IntrawareID>4011461</uri1:IntrawareID>
            </uri1:Reference>
            <uri1:Description>Catalog definition</uri1:Description>
            <uri1:Type>NORMAL</uri1:Type>
            <uri1:Subscription>FALSE</uri1:Subscription>
            <uri1:Temporary>FALSE</uri1:Temporary>
            <uri1:DefaultDurationYear>1</uri1:DefaultDurationYear>
            <uri1:DefaultDurationMonth>7</uri1:DefaultDurationMonth>
            <uri1:DefaultDurationDay>15</uri1:DefaultDurationDay>
            <uri1:CatalogManufacturer>
                <uri1:ID>QAAUTOManufacturer</uri1:ID>
            </uri1:CatalogManufacturer>
            <uri1:CatalogProductLine>
                <uri1:ID>QAAUTOPlne</uri1:ID>
            </uri1:CatalogProductLine>
            <uri1:StatusCode>INACTIVE</uri1:StatusCode>
    </uri1:SubscribeNetObject>
      </uri:Update>
   </soapenv:Body>
</soapenv:Envelope>
```

Update Product

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:uri="uri:webservice.subscribenet.intraware.com" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">
   <soapenv:Header>
      <uri:OptionsHeader/>
      <uri:SessionHeader>
         <uri:SessionID></uri:SessionID>
      </uri:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
    <Update xmlns="uri:webservice.subscribenet.intraware.com">
        <SubscribeNetObject xsi:type="uri1:Product" xmlns:uri1="uri:subscribenet.intraware.com">
            <uri1:Reference xsi:type="uri1:ProductReference">
                <uri1:IntrawareID>3634313</uri1:IntrawareID>
            </uri1:Reference>
            <uri1:Description>Product definition</uri1:Description>
```

```
            <uri1:ExportComplianceClassification>
                 <!-- For NLR, T = Yes, F = No -->
                <uri1:NLR>T</uri1:NLR>
                <!-- Expected values for ECCNCode: NO_EXPORT, NOT_APPLICABLE, UNKNOWN, 3D002, 3D991
etc -->
                <uri1:ECCNCode>UNKNOWN</uri1:ECCNCode>
                 <!--uri1:ENCCode></uri1:ENCCode>
                <uri1:CCATSCode></uri1:CCATSCode-->
            </uri1:ExportComplianceClassification>
            <uri1:EndUserLicenseAgreement>
                <uri1:AgreementName>ExportComplianceTestAgreement</uri1:AgreementName>
            </uri1:EndUserLicenseAgreement>
            <uri1:EvaluationEndUserLicenseAgreement>
                <uri1:AgreementName>Kelly's Agreement</uri1:AgreementName>
            </uri1:EvaluationEndUserLicenseAgreement>
             <!--Product note = Download Instructions -->
            <uri1:ProductNote>ProductNote</uri1:ProductNote>
            <uri1:PhysicalDistributionAvailable>0</uri1:PhysicalDistributionAvailable>
            <uri1:UserDefinedField code="QA_UDF">Created by QA</uri1:UserDefinedField>
        </SubscribeNetObject>
    </Update>
   </soapenv:Body>
</soapenv:Envelope>
```

Update Order

The email will be sent when updating an order with an additional line item. Updating an existing order line will not trigger an email when using the DEFAULT directive. If an email needs to be triggered, the directive that should be used is FORCE.

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
    <soapenv:Header>
        <SessionHeader>
            <uri:SessionID xmlns:uri="uri:webservice.subscribenet.intraware.com"></uri:SessionID>
        </SessionHeader>
        <OptionsHeader>
            <uri:OrderEmailDirective>DEFAULT</uri:OrderEmailDirective>
            <uri:OrderEmailVariation>DEFAULT</uri:OrderEmailVariation>
        </OptionsHeader>
    </soapenv:Header>
    <soapenv:Body>
        <Update xmlns="uri:webservice.subscribenet.intraware.com">
            <SubscribeNetObject xsi:type="uri1:Order" xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:Reference xsi:type="uri1:OrderReference">
                    <uri1:ID xsi:type="uri1:string">WSOrder0202</uri1:ID>
                </uri1:Reference>
                <uri1:Account xsi:type="uri1:AccountReference">
                    <uri1:IntrawareID>7030277</uri1:IntrawareID>
                </uri1:Account>
                <uri1:OrderDate xsi:type="xs:date">2011-11-19</uri1:OrderDate>
                <uri1:PurchaseOrderID xsi:type="xsd:string">WSOrder0202</uri1:PurchaseOrderID>
                <uri1:SalesRep>System User</uri1:SalesRep>
                <uri1:InvoiceID xsi:type="xsd:string">WSOrder0202</uri1:InvoiceID>
```

```
                <uri1:InvoiceDate xsi:type="xs:date">2012-11-19</uri1:InvoiceDate>
                <uri1:OrderNote>WS Order</uri1:OrderNote>
                <uri1:OrderLine xsi:type="uri1:OrderLine">
                    <uri1:LineNumber>1</uri1:LineNumber>
                    <uri1:SKU>AddOn_Users</uri1:SKU>
                    <uri1:Quantity>10</uri1:Quantity>
                    <uri1:EffectiveDate>2013-05-07</uri1:EffectiveDate>
                    <uri1:ExpirationDate>2014-05-06</uri1:ExpirationDate>
                    <uri1:FlexLicenseModel xsi:type="uri1:LicenseModelIdentifier">
                        <uri1:Code>DEFAULT_ORDERLINE</uri1:Code>
<!--                        <uri1:Name>AS_DurationBased_Feature</uri1:Name>
                        <uri1:IntrawareLicenseModelID>33</uri1:IntrawareLicenseModelID> -->
                    </uri1:FlexLicenseModel>
                </uri1:OrderLine>
                <uri1:TO>system@example.com</uri1:TO>
            </SubscribeNetObject>
        </Update>
    </soapenv:Body>
</soapenv:Envelope>
```

Update License Token

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
    <soapenv:Header>
        <SessionHeader>
            <uri:SessionID xmlns:uri="uri:webservice.subscribenet.intraware.com"></uri:SessionID>
        </SessionHeader>
        <OptionsHeader>
            <uri:OrderEmailDirective>DEFAULT</uri:OrderEmailDirective>
            <uri:OrderEmailVariation>DEFAULT</uri:OrderEmailVariation>
        </OptionsHeader>
    </soapenv:Header>
    <soapenv:Body>
        <Update xmlns="uri:webservice.subscribenet.intraware.com">
            <SubscribeNetObject xsi:type="uri1:LicenseToken"
xmlns:uri1="uri:subscribenet.intraware.com">
                <uri1:Reference>
                <uri1:ID xsi:type="xsd:string">TKN02</uri1:ID>
            </uri1:Reference>
            <uri1:CatalogItem xsi:type="uri1:CatalogItemReference">
<!--                For DEMO -->
                <uri1:ID>QATEST_FNPCert_Package</uri1:ID>
<!--                For SYBS
                <uri1:ID>10098</uri1:ID> -->
            </uri1:CatalogItem>
            <uri1:Product xsi:type="uri1:ProductReference">
<!--                For DEMO -->
                <uri1:ID>QATEST_FNPCert_Package</uri1:ID>
<!--                For SYBS
                <uri1:ID>10098-75-1500-41</uri1:ID> -->
            </uri1:Product>
            <uri1:EntitlementEffectiveDate xsi:type="xsd:date">2013-07-31</
uri1:EntitlementEffectiveDate>
```

```
            <uri1:EntitlementExpirationDate xsi:type="xsd:date">2014-07-30</
uri1:EntitlementExpirationDate>
            <uri1:EntitlementQuantity xsi:type="xsd:positiveInteger">10</uri1:EntitlementQuantity>
            <uri1:Register xsi:type="uri1:RegisterType">REQUIRED</uri1:Register>
            <uri1:AdminPrivilege>FALSE</uri1:AdminPrivilege>
            <uri1:DownloadPrivilege>FALSE</uri1:DownloadPrivilege>
            <uri1:ExpirationDate xsi:type="xsd:date">2015-07-30</uri1:ExpirationDate>
            <uri1:Status>INACTIVE</uri1:Status>
            <uri1:DownloadLimit>1</uri1:DownloadLimit>
            <uri1:UserDefinedField code="ACCOUNT-ACCT_LOGO">http://logo.com/images/main.png</
uri1:UserDefinedField>
            <uri1:UserDefinedField code="ORDER-CHANNEL-PARTNER-ID">TST2</uri1:UserDefinedField>
            <uri1:UserDefinedField code="ORDERLINE-LIC_EXP_DATE">2015-07-31</uri1:UserDefinedField>
            <uri1:UserDefinedField code="TOKEN_NOTIF_TO">system@example.com</uri1:UserDefinedField>
            <uri1:UserDefinedField code="TOKEN_NOTIF_CC">testuser@test.com</uri1:UserDefinedField>
            <uri1:UserDefinedField code="TOKEN_NOTIF_BCC">anothertestuser@test.com</
uri1:UserDefinedField>
            </SubscribeNetObject>
        </Update>
    </soapenv:Body>
```

Update Member

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://
www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:uri="uri:webservice.subscribenet.intraware.com">
    <soapenv:Header>
        <SessionHeader>
            <uri:SessionID xmlns:uri="uri:webservice.subscribenet.intraware.com">5d05ae61-28a5-472d-
baf9-aa327e0f2d44PJYNXEqM7vLqSazz4xsLQdXRhLzSV8raAeI=</uri:SessionID>
        </SessionHeader>
        <OptionsHeader>
            <uri:MemberEmailDirective>DEFAULT</uri:MemberEmailDirective>
            <!--uri:MemberEmailVariation>QA_Variation_01</uri:MemberEmailVariation-->
        </OptionsHeader>
    </soapenv:Header>
    <soapenv:Body>
        <Update xmlns="uri:webservice.subscribenet.intraware.com">
            <SubscribeNetObject xsi:type="uri1:Member" xmlns:uri1="uri:subscribenet.intraware.com"
xmlns:uri2="uri:webservice.subscribenet.intraware.com">
                <uri1:Reference xsi:type="uri1:MemberReference">
                    <uri1:Email xsi:type="xsd:string">system@example.com</uri1:Email>
                    <uri1:ID xsi:type="uri1:string">system@example.com/uri1:ID>
                    <uri1:AccountReference xsi:type="uri1:AccountReference">
                        <uri1:IntrawareID>35412913</uri1:IntrawareID>
                    </uri1:AccountReference>
                </uri1:Reference>
                <uri1:FirstName xsi:type="xsd:string">TestUser</uri1:FirstName>
                <uri1:LastName xsi:type="xsd:string">LastName</uri1:LastName>
                <uri1:JobTitle>TestJobTitle</uri1:JobTitle>
                <uri1:Phone>8474664603</uri1:Phone>
                <uri1:Fax>8474664604</uri1:Fax>
                <uri1:AddressLine1>1000 E Woodfield Road</uri1:AddressLine1>
                <uri1:AddressLine2></uri1:AddressLine2>
                <uri1:AddressLine3></uri1:AddressLine3>
```

```
                    <uri1:AddressLine4></uri1:AddressLine4>
                    <uri1:City>Schaumburg</uri1:City>
                    <uri1:State>IL</uri1:State>
                    <uri1:PostalCode>60173</uri1:PostalCode>
                    <uri1:Country>US</uri1:Country>
                    <uri1:AdminPrivilege>TRUE</uri1:AdminPrivilege>
                    <uri1:DownloadPrivilege>TRUE</uri1:DownloadPrivilege>
                    <uri1:MemberNote>TestNote</uri1:MemberNote>
                    <uri1:Status>ACTIVE</uri1:Status>
                    <!--uri1:UserDefinedField code="QaUser?">Yes</uri1:UserDefinedField-->
                    <uri1:Permission xsi:type="uri1:Permission">
                        <uri1:PermissionType>PDCT</uri1:PermissionType>
                        <uri1:PermissionValue>true</uri1:PermissionValue>
                    </uri1:Permission>
                    <uri1:Permission xsi:type="uri1:Permission">
                        <uri1:PermissionType>DOCS</uri1:PermissionType>
                        <uri1:PermissionValue>true</uri1:PermissionValue>
                    </uri1:Permission>
                    <uri1:Preference xsi:type="uri1:Preference">
                        <uri1:PreferenceType>EMAIL</uri1:PreferenceType>
                           <uri1:PreferenceValue>ON</uri1:PreferenceValue>
                    </uri1:Preference>
                    <uri1:Preference xsi:type="uri1:Preference">
                        <uri1:PreferenceType>DOWNLOAD</uri1:PreferenceType>
                        <uri1:IntrawarePreferenceKeyID>Aspera</uri1:IntrawarePreferenceKeyID>
                        <uri1:PreferenceValue>OFF</uri1:PreferenceValue>
                    </uri1:Preference>
                    <uri1:Preference xsi:type="uri1:Preference">
                        <uri1:PreferenceType>DOWNLOAD</uri1:PreferenceType>
                        <uri1:IntrawarePreferenceKeyID>HTTP</uri1:IntrawarePreferenceKeyID>
                        <uri1:PreferenceValue>ON</uri1:PreferenceValue>
                    </uri1:Preference>
                </SubscribeNetObject>
            </Update>
        </soapenv:Body>
    </soapenv:Envelope>
    </soapenv:Envelope>
```

Sample SOAP Calls

In order to transfer a session ID programmatically between two requests, use the property transfer test step. Download the following file for an example to transfer the property between two requests:

PropertyTransfer.xml

Import this test case into your project. This is executed against the FNOC endpoint.