

## HCL Unica Licensing Guide



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# Chapter 1. Licensing Overview

HCL Unica products are license based, user will need to configure required licenses with HCL Unica products to start using them. This document provides details about the licensing for HCL Unica products. Below is the list of the HCL Unica products for which a license is mandatory:

- Unica Marketing Platform
- Unica Campaign
- Unica Interact
- Unica Deliver
- Unica Journey

After user performs clean install or upgrade install of 12.1 version of Unica products and deploys HCL Unica products, user needs to configure the license. While user visits the HCL Unica – Platform application URL it will redirect to license details screen. User needs to configure the licenses to get started with HCL Unica products. Only after providing valid license information user will be redirected to Unica Marketing Platform login screen.

# Chapter 2. What User Needs To Do?

HCL Unica customers will get a HCL License portal URL and login credentials via email. This portal will have the license entitlements allotted as per the purchase done by the customer. The customer needs to follow below mentioned steps to complete the registration process and configure the devices for HCL Unica products.

High-level steps involved in the licensing process are as outline in the below table:

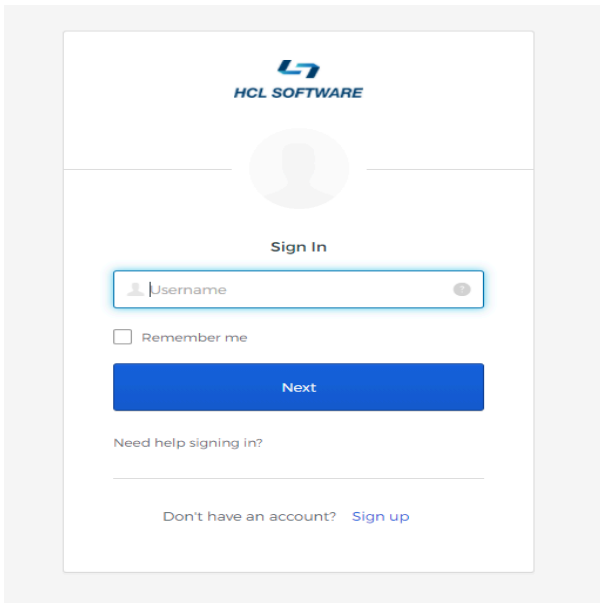
Topic	Section
Register on HCL License Portal	<a href="#">HCL License Portal on page 5</a>
Complete Registration Process and Add Users	<a href="#">HCL License Portal - Add Users on page 5</a>
Create Devices	<a href="#">HCL License Portal - Create Devices on page 6</a>
Map Entitlements	<a href="#">HCL License Portal - Map Entitlements on page 9</a>
Download Product Installers and Complete the Installation and Deployment process	<a href="#">HCL License Portal - Download Package and Install on page 10</a>
Configure License in Unica Marketing Platform	<a href="#">License Configuration on page 26</a>
Validate the Licenses and consumption details	<a href="#">Licenses and Consumption details on page 27</a>

## Chapter 3. HCL License Portal

The license portal provides both Software distribution and management of your Software entitlements purchased from HCL Products and Platforms. The portal provides you with control and flexibility on how to consume your licenses. Typically, an organization will have someone identified as a License Manager that has familiarity with the language of Licenses, and you may wish to add them as a user. If not, you will find these instructions sufficient to begin using your HCL Software.

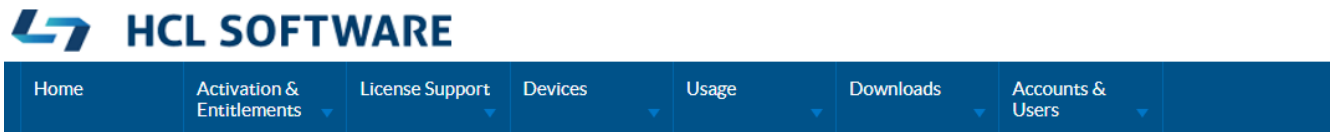
### HCL License Portal - Add Users

Login to the portal using your email address and your reset password.



The screenshot shows the HCL Software Sign In page. At the top, there is the HCL Software logo. Below it is a placeholder for a user profile picture. The main heading is "Sign In". There is a text input field labeled "Username" with a person icon on the left and a search icon on the right. Below the input field is a checkbox labeled "Remember me". A blue "Next" button is positioned below the checkbox. Underneath the button, there is a link that says "Need help signing in?". At the bottom of the form, there is a link that says "Don't have an account? Sign up".

Use the navigation banner and click on "Accounts & Users" and then "List Users".



## License & Download Portal

Your account will be listed. Click on "Actions" and then "Create". Complete the web form required fields and any additional fields to the extent your organization requires. Link the new user to your account with the appropriate permissions.

## Create User

Enter the user details below. Click Save to create the user.

### User Info

Can this user log in to FlexNet Operations? \*  Yes  No

Shared Login:  Yes  No

Status:  Active  Inactive

First Name\*

Last Name\*

Time Zone (GMT -5.0) Eastern Time

Email Address\*

Opt in to receive email  Yes  No

Expiring entitlements email

Phone

Fax

### Contact Info

Street

City

State/Province

Zip/Postal Code

Country

### Accounts

Actions ▾

<input type="checkbox"/>	Account ID	Account name
No accounts linked to this user.		

Save

Cancel

## HCL License Portal - Create Devices

On the navigator, bar hovers on Devices and then click on Devices.



Home	Activation & Entitlements ▾	License Support ▾	Devices ▾	Usage ▾	Downloads ▾	Accounts & Users ▾
------	-----------------------------	-------------------	-----------	---------	-------------	--------------------

## License & Download Portal

Your list might be empty if this is your first purchase from HCL Products and Platforms, or you might see a list of devices that were previously created for your account. You may optionally use one of these previously created devices or create a new device for your recently purchased entitlements. Click on "Create Device" for creating a new device.

If you are having multiple environments of HCL Unica products, like production environment, staging environment, etc., it is recommended to create a device for production environments only. Other than production type environments, no

other environment needs to have a license configured. If you have multiple production environments, it's recommended to create a dedicated device for each production environment. This will help to keep the license usage separate across each production environment. From each environment, the user will be able to check the license usage. License usage for all these environments will be consumed from the mapped entitlements.

The entitlement consumption will only be measured on the Production setup.

## Device New Device

Name:\*

Runs license server? ?

ID Type:\*  ?

ID:\*

Account:  ?

Site name:

Save

Enter a Name for your Device and select "Runs License Server". For Server Deployment select "Cloud". Later HCL will add support for Local Server. Then enter a Site Name that suits your organization.

# Device New Device

Name: \*

Runs license server? ?

Server deployment:  Local  Cloud

Site name:  ×

**Save**

You will get a response screen that confirms the Server was created. Record the License Server ID, as this will be used during the install of your purchased software to talk with the Cloud License Server.

 Server created successfully.

## View Server

**View** ▼ **Action** ▼

License Server ID	BVHU3N2X9YC5
Auto Provisioned	No
Name	CloudLicenseServer
Site Name	ClientNameCLS
Account :	HCL Demo Account (HCL Demo Account)
Server Status :	ACTIVE

## Model Details

The device model does not include any pre-installed licenses.

No licenses are currently mapped.



## HCL License Portal - Set Admin Password

Setting the admin user password for the device/server is mandatory. Hover on Actions and then click on “Set Password”.

### Set Password

Set the password for an administrative user of this cloud license server instance. This password is required if you want to use the REST API to communicate with your cloud license service.

The password must meet these criteria:

- a length between 8 and 30 characters
- at least one upper case alpha character and one lower case alpha character
- at least one digit
- at least one of these special characters: ( ^\*\$-+?\_&=!%{}/# )
- no space

Server ID BVHU3N2X9YC5

Password

Confirm Password

Set Password

## HCL License Portal - Map Entitlements

Your entitlements must be mapped to either a preexisting Cloud License Server or the Server you just created. Hover on Actions and then click on “Map Entitlements”.

### Map Entitlements

ID GFHJOMWNC7  
 Name SID  
 Account: Marketing Suite SVT

Qty to add	Available qty	Total qty	Product	Activation ID
<input type="text"/>	259	500	HCL_Plan_Enterprise	28bc-5399-1f4a-46f9-a303-3808-63bc-efee
<input type="text"/>	79887	100000	HCL_Optimize	0651-a42e-80a1-429f-a79f-842f-f3be-ddea
<input type="text"/>	78776	100000	HCL_Campaign	5531-718a-40bd-4d5d-9eca-35cb-f92c-d234
<input type="text"/>	74879	100000	HCL_Interact	a81b-d8d0-d3a3-4f20-b9a9-3153-7842-8fbe

Save

You can map all the entitlement to this Server or split the entitlements between Servers to allocate your purchase to different teams in the organization. You will be presented with a confirmation screen.

# View Server

View Action

License Server ID T144A322B8V1  
Auto Provisioned No  
Name HCLUNICACAT&HERT  
Site Name HCLUNICATEST  
Account : HCL00001 (PowerObjects (Test Account))  
Server Status : ACTIVE

## Model Details

The device model does not include any pre-installed licenses.

## Licenses

Product	Activation ID
---------	---------------

## HCL License Portal - Download Package and Install

To obtain your entitled Software for installing, hover on Downloads and then click on "List Downloads".



Home	Activation & Entitlements	License Support	Devices	Usage	Downloads	Accounts & Users
------	---------------------------	-----------------	---------	-------	-----------	------------------

## License & Download Portal

Click on the Product Line that the Product you have entitlement for. The latest version of the software and Previous Versions will be available to you.

### Download Packages

The Download Packages page lists new and archived versions of downloadable components along with helpful details of the download.

#### Automation

New Versions		Previous Versions	
Description	Date Available	Log Details	
HWA_94FP2_LNX_X86_64_AGENT	Feb 15, 2018	Download Log	

Click on the download package to select the download file(s)

## Downloads

HWA\_94FP2\_LNX\_X86\_64\_AGENT 9.4.0.02

Files		Download Log	Notification Log
<a href="#">Download Selected Files</a>			1 File(s)
<input type="checkbox"/>	File Description	File Size	File Added
<input type="checkbox"/>	HWA 9.4FP2 Agent for Linux x86_64	501.46MB	Feb 15, 2018
			<a href="#">TWSS94FP2_LNX_X86_64_AGENT.zip</a>

Select the file you want to download and click on “Download Selected Files”. Complete the download and use the Server ID during the install process to enable the Product to talk with the Cloud License Server and consume the license quantity you allocated to that Server.

Users of the software will be authorized to use the software up to the allocation of entitlement you made on the Server. They will be present with a message if the entitlement has been consumed.

Clients will be able to exceed the entitlement level on demand and will be billed on a yearly basis for the Overdraft Usage. The Terms of this practice are described on the Order Schedule in the Product-Specific Terms. If you desire to know more about this, contact the HCL Support organization.

<https://www.hcltech.com/products-and-platforms/contact-support>

## Chapter 4. Flexnet License Server

Flexnet (FNO) is a software license manager. Unica product licenses are created by FNO admin. Licenses can be either a meter base or count base. FNO Admin creates licensing models, add products and entitlements. Further, FNO creates a User account and add the pre-defined entitlements.



**Note:** For all the products, Platform acts as a gateway for sending the audience counts information to FNO.

# Chapter 5. License Models Supported with HCL Unica

HCL Unica products supports below license models.

1. Term based licenses
2. Perpetual licenses

If you are upgrading from earlier versions of Unica products to version 12.1 you can have the option to take Perpetual type license for the existing products, you are entitled to use. And for new product licenses, you can take the option of Term based licenses. This is flexible as per your entitlement plan. In the upgrade scenario, you could have Term and Perpetual licenses in your entitlements.

HCL supports below type of counting mechanism for products in HCL Unica suite:

Unica Marketing Platform	Count base
Unica Campaign	Count base
Unica Interact	Metered
Unica Deliver	Metered
Unica Journey	Metered

## Term Based Licenses

Term based licenses will be allocated to all new product licenses when you will install/upgrade Unica 12.1 products. Term duration can be anything. Unica support term based licenses with multiple options. Term based licenses come with effective and expiry dates. These term based license could also have restrictions on consumption. Please find below details on these options which are supported with Unica.

1. Term based license with a grace period
2. Term based license with an overdraft. This overdraft can be restricted or unrestricted.

For Term with the "Overdraft" licensing model. Users will have the overdraft entitlements configured in the HCL License Portal on the purchase of HCL Unica products. Using the Overdraft capability user will be able to exceed the entitlement level on demand and will be billed on a yearly basis for the Overdraft Usage. If you do not have the "Overdraft" licensing model and usage exceeds allotted quota your application access will be restricted. Application access will also be restricted if the user consumed the allotted quota from the "Overdraft" limited model.

Grace period can also be provided along with Term based license model. This will give grace time to use to complete the purchase process for the next term. With Unica product, you will be getting 90 days grace period with Term based license.

## Perpetual Licenses

If you are upgrading from earlier Unica version to 12.1 you could have the option to use the Perpetual license model for existing products, you are a license to use. The perpetual model does not have any duration associated with it and does

not have any restrictions on consumption. Per year this license usage will get reset and Unica will start capturing the consumption fresh for next year. HCL will be billing the customers based on the consumption of products in the Perpetual license model.

## License Check on Unica Launch

When you launch Unica application after upgrade or clean install of 12.1 version it checks for the license validity. When Unica application launches for the first time it will prompt you for the license. You will need to provide license details. Unica does not need to have licenses configured on the non-production environments. License device associated with any production environment should have the Unica Marketing Platform entitlements associated with it. You will not be able to access/launch applications if your device does not contain entitlements for that respective product.

## Term license flow

If any of product in entitlement is Term based license model, it will get elapsed in the following scenarios:

1. Respective product will not accessible if the term is expired and does not have a grace period or grace period is elapsed.
2. Respective product will not be accessible if allotted quota is utilized and the user does not have an overdraft.
3. Respective product will not be accessible if allotted quota is utilized and limited overdraft quota is also utilized.

You will be able to use the product and consume the entitlements while term based license duration is between effective and expiry date and consumption are below allotted quota.

## Perpetual license flow

Perpetual licenses do not have any restrictions and expiry date. Perpetual licenses supported with Unica are “Overdraft” with no constraints. Perpetual licenses consumption will be reset every year. Unica will continue updating the entitlements count after reset as per the usage.

## Alerts and Notifications

Unica will be sending alerts and notifications on different events or triggers on the license usage. Notifications & alerts will be sent to users with role Admin Role (HCL Marketing Platform) and the System alerts (under Notification Subscription for Unica Platform ) are turned on for the user.

License Type	Product	Alert or Notification	Scenario
Term/Perpetual	Unica Marketing Platform	Alert and notification both	No valid license found for Unica Marketing Platform
Term	All	Alert and notification both	Term license -reaches to mid duration
Term	All	Alert and notification both	Term license -reaches to 30 days of expiry

License Type	Product	Alert or Notification	Scenario
Term	All	Alert and notification both	Term license – reaches to 7 days of expiry
Term	All	Alert and notification both	Term license - reaches to expiry 24 hours.
Term	All	Alert and notification both	Term license –expiry by NN:NN time.
Term	All	Alert and notification both	Term license - already expired.
Term	All	Alert and notification both	Term license – grace period details
Term	All	Alert and notification both	Term license – every day, till term grace period ends
Term	All	Alert and notification both	Term licenses – when grace period ends
Term	All	Alert and notification both	Consumption count – reaches 50% usage
Term	All	Alert and notification both	Consumption reaches to 75%
Term	All	Alert and notification both	Consumption reaches to 90%
Term	All	Alert and notification both	Consumption reaches to 95%
Term	All	Alert and notification both	Consumption reaches to 100%
Term	All	Alert and notification both	License consumption expired
Term	All	Alert and notification both	License consumption with overdraft details if any
Term	All	Alert and notification both	Consumption details with overdraft – till overdraft reaches to end.
Perpetual	All	Alert and notification both	Consumption count – reaches 50% usage
Perpetual	All	Alert and notification both	Consumption reaches to 75%
Perpetual	All	Alert and notification both	Consumption reaches to 90%
Perpetual	All	Alert and notification both	Consumption reaches to 95%

License Type	Product	Alert or Notification	Scenario
Perpetual	All	Alert and notification both	Consumption reaches to 100%
Perpetual	All	Alert and notification both	License consumption being used in unrestricted quota



**Note:** Marketing Platform and Campaign products, support count based licensing mode. The consumption range for these products vary i.e. can go up or can come down. When the consumption reaches multiple values, then notification will be sent to the user. Notification will be sent to the user only the first time when they consume multiple values of the entitlement usage.

## Usage Management for Unica Products

Unica provides term and perpetual licenses categorized under UPP (Unica Power Pack) and a la carte parts. The license comes with one year validity.

Customers will be charged based on the number of units - UPP, they subscribed for.

Unica Products	UPP	Entitlements
Unica Marketing Platform	4 Full User	Users are entitled to have 4 Users
Unica Campaign	250k Audience records	Users are entitled to use 250K distinct audience records
Unica Interact	12 million Omnichannel interactions	Users are entitled to have 12 million Session
Unica Deliver	12 million Deliver (E-messages)	Users are entitled to send 12 million E-messages
Unica Journey	12 million Journeys Audiences	Users are entitled to have 12 million Journey Audience

## Unica Platform license

Platform license uses the Platform User record to calculate the usage. A Platform User is defined as:

### Platform User

Platform User is a measuring unit by which the Program can be licensed. A Platform User is a unique person who is given access to the Unica Marketing Platform.

An entitlement for a Platform User is unique to that user and may not be shared, nor may it be reassigned, other than for the permanent transfer of the Platform User entitlement to another person.



Licensed by named users, not concurrent users. This metric is derived by adding the total number of unique users expected to access the Unica Marketing Platform in a given year.

Unica Marketing Platform entitlement is calculated as:

- Each new active user created is counted as 1 usage
- Each user updated from Disabled to Active is counted as 1 usage
- Each deleted user decremented usage count by 1
- All sync users from LDAP will be counted in usage
- All SAML users (Manual/On the fly user creation) will be counted in usage
- After the application is manually deployed it is recommended not to make any amendments.
- Master and Slave Platform – this is used for Interact with multiple server groups. Please refer to Interact licensing details in subsequent sections for details.



**Note:** Starting 12.1.3, above calculations will only consider users with user type as Full.



**Note:** By default, all sync users from LDAP will be if type Full user. Also, by default, all SAML users (Manual/On the fly user creation) are marked as type Full.

In 12.1.3 version we have introduced a new user type, "Lite User", for Legacy customers. This Lite user have limited set of permissions and will be available only for Plan and Collaborate in Unica."

- This will calculate users with user type as Lite.
- Each new active lite user created is counted as 1 usage.
- Each lite user updated from Disabled to Active is counted as 1 usage.
- Each deleted lite user decremented usage count by 1.

One Licensing device can be used with only one Unica application, this is identified with Unica application URL, so Unica license should be applied after SiteMinder or ISAM configuration. If the Unica is already registered with a device before url change, it will display an error saying, "One or more hosts are connected to the license server. Application does not support multiple hosts connecting to the same license device. Please update the license details in the application to continue using the application."

In case, you require to perform fast upgrade or configure Unica application with SiteMinder/ISAM or change the application URL, then complete the following steps:

1. Once you complete the upgrade (in-place or fast upgrade) or clean installation of version 12.1, apply NON-PRODUCTION mode on Unica environment.
2. If you want to change the application URL, then either configure ISAM / Siteminder login methods or perform any change in Unica application URL.

Once this is done you can continue to use your application enabled with Licenses. If moving ahead for any reason you need to change your application url, you will need to generate a new device and use it with Unica application.



**Note:**

1. Only active users are charged.
2. Switching of devices is strictly not allowed.
3. Single device does not support multiple Unica environments, as this can result in generating report with incorrect consumption count.

**Site** - Site grants the purchaser permission to use the software on a network on a single site (used in 1 production environment and used in any number of non-production environments).

## Unica Campaign License

Campaign license uses the marketing audience record to calculate the usage. A marketing audience record is defined as:

### Marketing Audience Record

A Marketing Audience Record is a unique entity or entry in a database or file, or any data store containing customer or prospect information and accessed by the Unica Marketing Platform for marketing purposes.

A Marketing Audience Record can represent an active customer, inactive customer or prospect. This metric is derived by adding unique marketing audience records across audience levels serviced by Unica Marketing Platform in a given year.

Unica Campaign entitlements consumption is calculated using below methods:

#### Method 1

- Each distinct audience record is counted as 1 entitlement.
- Unica Campaign license usage is measured only for base tables mapped in the flowcharts.
- Unica Campaign license usage measures the base table record count for the flowcharts, which are executed in the licensing period.
- Flowcharts for mapped tables/files are scanned to get the count of distinct audiences.
- In case there are multiple base tables mapped for an audience level, then the maximum count of records with respect to a distinct audience is considered.
- Base table could be mapped to database table or physical files.
- For different audiences, the highest record for each audience will be considered.
- Consumption count is the summation of audience records per audience level.
- The same process is repeated for each Campaign partition. Campaign sends summation of records of each partition to Platform.

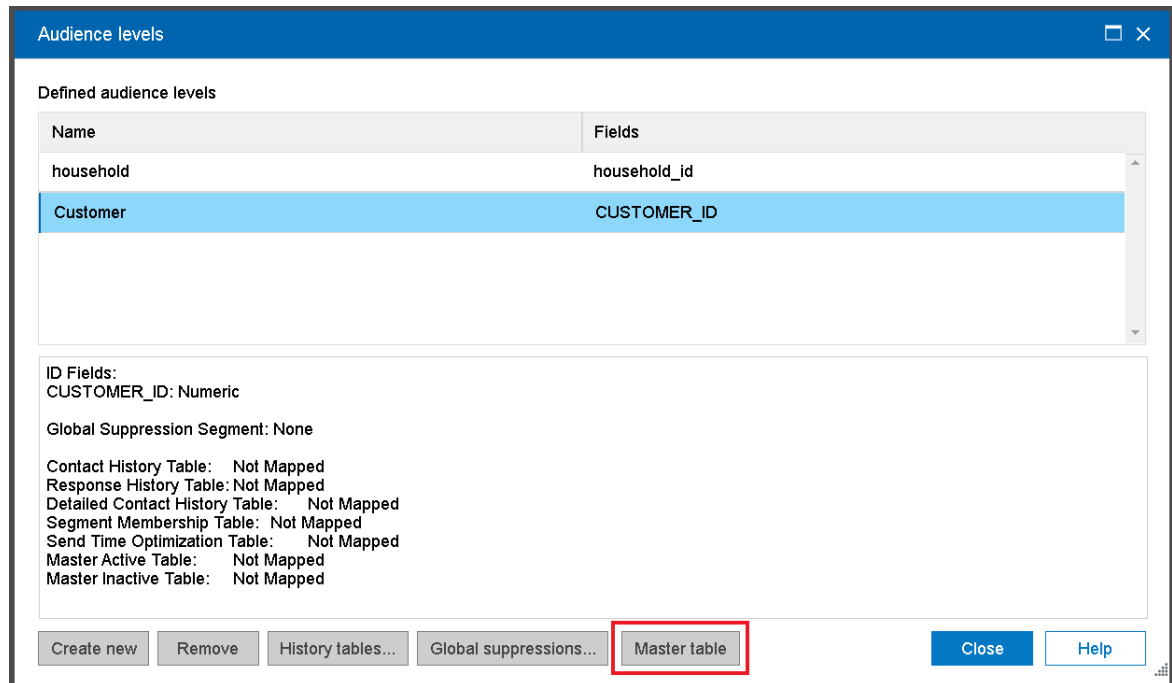
Campaign consumption is calculated with below formula:

Summation of records per partition (Summation of records per Audience level (Max of distinct records from all the base table from each executed flowchart)).

#### Method 2:

Customer need to identify which audience should be used as master audience level and which table should be used as master audience table, in every partition, as shown below:

- Go to **Settings > Campaign Settings > Manage audience levels**
- On **Manage audience levels** dialog box:
  - Choose any audience from the list which can be considered as Master Audience Level.
  - Click on **Master Table** button.



- Select <audience name> Master Active Table from the list
- Click on **Map** button to choose table which can be considered as Master Audience Table for active records.
- Select <audience name> Master Inactive Table from the list

- Click on **Map** button to choose table which can be considered as Master Audience Table for inactive

Table mappings

Unica Campaign Metering table	Database table name
<u>Customer Master Active Table</u>	
<u>Customer Master Inactive Table</u>	

--- Table is not yet mapped ---

Unmap table **Map table...** Close Help

records.

Audience levels

Defined audience levels

Name	Fields
household	household_id
Customer	CUSTOMER_ID

ID Fields:  
CUSTOMER\_ID: Numeric

Global Suppression Segment: None

Contact History Table: Not Mapped  
 Response History Table: Not Mapped  
 Detailed Contact History Table: Not Mapped  
 Segment Membership Table: Not Mapped  
 Send Time Optimization Table: Not Mapped

**Master Active Table: dbo.customer**  
**Master Inactive Table: dbo.Big\_tab\_twelveM**

Create new Remove History tables... Global suppressions... Master table Close Help

◦ Close

- Repeat all above steps for other audiences if customer have more than one Master Audiece Levels/Tables.

 **Note:**



- Each audience can be mapped with only one Master Audience Table either for active records or inactive records.
- Mapping would be done with only tables from user data source and not from system data source.
- Customer can perform Unmap Table and Re-map Table operations as and when required.
- Campaign consumption is calculated periodically. unica\_acsesutil utility is run intermittently to collect processed records count, which is used to derive entitlement consumption.

If single master audience level/table is identified for active records then Campaign will send respective mapped table name and unique record count to platform, from every partition. For eg. If you see in above mapped table list, Campaign will send dbo.customer tables unique record count to platform.

If multiple audiences have master active/inactive tables mapped then Campaign will consider all respective mapped table names and their unique record counts.

If master audience level/table is identified for inactive records then Campaign will consider only 20% unique record count of it. For eg. If you see in above mapped table list, Campaign will send count as - all unique record count of dbo.customer + 20% unique record count of dbo.Big\_tab\_twelveM

Customer MUST have inactive records in a separate table or they will be charged full price.

**Site** - Site grants the purchaser permission to use the software on a network on a single site (used in 1 production environment and used in any number of non-production environments).

## Unica Interact License

Interact license uses Omni Channel Interaction to calculate the usage. An Omni Channel Interaction is defined as:

### Omni Channel Interaction

An Omni Channel Interaction is a unique personalization session for an audience serviced by Unica Marketing Platform on any channel/device or touchpoint. A session is defined as a series of API requests from the same uniquely identified client with a time of no more than 30 minutes and no requests for APIs from other domains intervening between requests. In other words, a session ends when someone goes to another site, or 30 minutes of inactivity, whichever comes first.

An Omni Channel Interaction can be initiated by any channel/touchpoint (website, email, mobile etc.) or device (IVR/ATM/Kiosk/POS/Scanner etc.). This is derived by adding the total number of interactions for audiences across channels in a given year.

Unica Interact entitlement is calculated as:

- Each session containing `get-offers`, `get-offers-for-multiple-interaction-points`, or `post-event` with `triggered-action` will be counted as one usage.
- There will be no usage for all the subsequent `get-offers`, `get-offers-for-multiple-interaction-points`, or `post-event` with `triggered-action` API invocations in the same session.

- There will be no usage for each newly created session.
- There will be no usage for all the other API invocations.
- Interact Multiple Server Groups:

If you are using Interact and you have multiple Interact server groups installed with multiple Marketing Platform instances then you can use options provided on licensing details screen as Master and slave.

On the license detail page, select Platform radio button for making current platform as slave. You can use this option for the Marketing Platform used for the Interact runtime server group. Each Marketing Platform instance used for runtime server group should select this option.

On selection, the user will be asked for a Master platform - URL, You will need to provide the Marketing Platform URL of the Marketing Platform which is connected with the License Server.

You can enter Active User credentials (username/password). Upon entering details and successful authentication, the slave platform will connect to the license server via the master Marketing Platform. Consumption will be reported on the license server connected to the master Marketing Platform.

Slave platform(s) calls the master platform for maintaining entitlement consumption count. Interaction count pushed by Slave platform is added into Master Platform's Interactions count. The Sum of both (Master and Slave) count is pushed to FNO.

Example:

- Master interaction count = 10
- Slave interaction count = 5
- Total interaction count to update on License server will be  $10+5 = 15$

## Unica Deliver License

Deliver license uses the Email Messages Sent record to calculate the usage. An Email Messages Sent is defined as:

### **Email Messages Sent**

Email Messages Sent is a measuring unit by which the HCL Unica Deliver email usage can be obtained. Email Messages include any email sent through HCL Unica Deliver such as a transactional or an email sent in a batch.

An Email Message is an electronic communication sent through the HCL Unica Deliver. Sufficient entitlements must be obtained to cover the estimated number of emails to be sent during the contractual term specified in a Proof of Entitlement or Order. When actual usage is above or below the estimated usage, then renegotiation of the Order will be required at the time of renewal for the following term to account for any disparity. For more details, refer *Deliver Service Description Document*

Unica Deliver entitlement is calculated as:

- Emails sent using Deliver are tracked on a monthly/yearly basis.
- 1 email send using Deliver is counted as 1 entitlement.

- Users are entitled to 1 million Unica Deliver Email Message per month, that can be carried forward from one month to another within a year.
- Users are entitled to 12 M Unica Deliver Email Message every year.
- Five types of mails are counted are Production mails, Test mail, Schedule mails, Bounce mails and TMS.

Based on Partner models deliver licenses are of two types Referral and Reseller.

#### Partner Models (Referral vs Reseller)

##### 1. Referral Agreement (AKA Channel Partner)

- Customer signs directly with partner
- Price change notification communicated is exposed to directly with customer
- Preferred for deals were customer is exposed to price fluctuations to benefit from lowest possible prices.
- Minimum admin overhead in managing HCL price change in usage/billing systems.
- Minimises renewal conversations for intra-annum deals.

##### 2. Reseller Agreement

- Customer signs with HCL, Partner invoices HCL and HCL bill customer.
- Price changer notifications updated at term renewal time (annually).
- Preferred for deals were the customer prefers a single contract.
- Minor admin overhead for HCL in managing renewals.
- Part and price lists require periodic updates and maintenance.
- Allows HCL to offer price stability for an increase in price and a one stop shop contract for email / SMS.
- WhatsApp cannot be resold – WhatsApp customers can only be referred.

Product	Type
Deliver_Email_Messages	HCL Owned
Deliver_SMS_Karix	Referral
Deliver_SMS_Twilio	Reseller
Deliver_SMS_RML_Channel	Referral
Deliver_SMS_RML_Reseller	Reseller
Deliver_Whatsapp_RML	Referral
Deliver_Litmus	Reseller
Deliver_Mailmonitor	Reseller

License for Litmus and Mailmonitor cannot be configured on the non-production environments. For Litmus each client preview will consume 52 licenses. Also, overdraft facility is not available for any of the resellers, litmus and mailmonitor. For resellers, Litmus and MailMonitor once the allocated entitlements are consumed user cannot use that feature.



**Note:** Unica Deliver will not consume any entitlements for referral type licenses. This applies to SMS if license is of referral type. It applies to WhatsApp also as WhatsApp license is always of referral type.

### RML SMS Reseller

Starting 12.1.6, SMS RML Reseller consumption counts will be updated every 24 Hrs. If we send SMS now, consumption counts will be updated within 24 Hrs and can be seen on the OP Platform license details page. As RML API provides an accurate count considering all message parts in case of lengthy SMS, we may see a consumption count more than the number of SMS sent by the user.



**Note:** If the OP version is less than 12.1.6 and the OD version is 12.1.6 or greater, then the application can calculate the correct SMS consumptions count starting from the upgrade date. Past consumption counts cannot be corrected.

## Unica Journey License

Journey license uses Journey Audience to calculate the usage. A Journey Audience is defined as:

### Journey Audience

A Journey Audience Record is a unique entity or entry in a journey, containing customer or prospect information and serviced by the Unica Journey module of the Unica Marketing Platform.

A Journey is a multi-step omni channel orchestration of a customer experience.

Unica Journey entitlement is calculated as:

- Each Journey audience (Customer or other marketable entity records) is counted as 1 entitlement.
- Journey discarded audiences records are not counted in entitlement.
- Journey sends the consumption count to the Marketing Platform. Marketing Platform regularly sends the consumption details to the License Server.
- Users are entitled to 1 million Journey audiences or record per month, that can be carried forward from one month to another within a year.
- User are entitled to 12 M Journey audiences every year.

Journeys licensing mechanism starts counting audience consumption for each day starting from mid night. While applying the licenses on non-production environment of Journey, there should not be any consumption / audiences being pushed to Journey before you apply the license. If there are any consumption on the same day before applying the license it would get added in the utilization of Journey consumption.

## Unica Link license details on consumption

Unica Link uses the license details configured in the Marketing Platform. Below entitlements are available for Unice Link (framework and connectors)



- Link Framework
- HCL\_LINK\_Mailchimp
- HCL\_LINK\_Mandrill
- HCL\_LINK\_Twilio
- HCL\_LINK\_Salesforce
- HCL\_LINK\_Facebook\_Ads
- HCL\_LINK\_Google\_Ads
- HCL\_LINK\_LinkedIn\_Ads

You can add the required license entitlements as per requirement. In Campaign or Journey user can use the connections without any license validations. If you do not have a valid entitlement for Unica Link then you would not be able to run Campaign flowchart or Journeys which are using these connectors.

Every regular interval - Unica Platform updates the connection usage in the licensing portal. If you are not using any connector license consumption count is 0 (zero) and once you start using the connection in Unica Campaign or Journey it changes from 0 (zero) to a positive number.


Unica Link licenses are counted either as used or unused. 0 (zero) indicates it is unused and any positive number indicates it is being used. Unica Link consumption is not metered based on the number of connections.

While applying the entitlements also Unica Link does not consider the number of entitlements so the initial count is displayed as 0 (zero) only.

**Site** - Site grants the purchaser permission to use the software on a network on a single site (used in 1 production environment and used in any number of non-production environments).

# Chapter 6. License Configuration

User will need to configure the license with HCL Unica products before start using, when users access the Unica Platform login URL – it will get redirected to the license configuration page. The user needs to configure the license details on this page. Unica Platform will validate the license and on a successful license, the configuration user will be redirected to the Unica Marketing Platform login screen. There are two radio buttons on the License configuration screen Flexnet and Platform. Flexnet button will connect to Flexnet to consume the license and Platform option is for Master slave configuration. Slave platform will consume the license from the Master platform, so for slave platform user needs to click on the Platform radio button and enter the master platform url and credentials. Once this is done, slave platform will start consuming license from the Master platform, which in turn will consume license from Flexnet.

License server	License Server API url, User can get the license server url from the HCL License portal. Flexnet License server sample url <a href="https://hclsoftware.compliance.flexnetoperations.com/api/1.0/instances/&lt;DeviceId&gt;">https://hclsoftware.compliance.flexnetoperations.com/api/1.0/instances/&lt;DeviceId&gt;</a>   <b>Note:</b> Here Deviceid is individual user Device Id
User	HCL License Server – For any device created by default “admin” user is supported.
Password	Password set for the device
Unica Environment Type	User can specify if this is “Production” or “Non-Production” environment.
Proxy	Use proxy server to connect to HCL License Portal. Use proxy server if you do not have outbound access to HCL License Portal.
Proxy Host	Proxy server hostname or IP address
Proxy Port	Proxy server port
Proxy User	Proxy server user
Proxy Password	Proxy server user’s password



**Note:** Field **Proxy User** and **Proxy Password** accepts dummy data as input (if required).

License details

Flexnet  Platform

\*License server URL

\*Username       \*Password

Proxy

\*Proxy host       \*Proxy port

\*Proxy user       \*Proxy password

[Save](#)

All these license server details are stored in Unica Platform. User can navigate to Settings > Licensing details page if license details need to be changed.

## License Server Availability

HCL Unica products need to be always connected to the HCL License Portal. You can choose to connect with the HCL License portal in multiple ways:

- Connecting directly to HCL Licensing portal from Unica application.
- Connecting to HCL Licensing portal from Unica application using proxy based connection.
- Setup Local License server for HCL License portal and connect to Local License server from Unica applications.

Unica application requires the licenses to be configured in the production environment. Once the license details are configured and Unica application connects the license server for the first time, then it stores the license details. HCL Unica products keep on updating the consumption details to HCL License portal every 10 mins. In case of connectivity issues, the consumption details will be held back with the Unica Platform and once the connectivity is established the consumption will be updated on the HCL License portal. If there is connectivity issue is for a longer period between Unica applications and HCL Licensing portal - Unica application uses the information stored in Unica application. Based on the type of licenses configured it allows or restrict the access to application or usage.

## Licenses and Consumption details

User can check the licenses consumption details from HCL License Portal as well as from the Unica Platform licensing details page. Users can navigate to Settings > Licensing details page. Clicking on View License details page will show the license consumption count for all entitled products.

Product Name	HCL Unica product name for which entitlement is allotted
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License Type	Term/Perpetual
Start Date	Entitlement start date
Expiry Date	Entitlement expiry date (Not applicable for Perpetual license)
Entitlements available	Total number of entitlement allotted for a device or server.
Entitlements consumed	Number of entitlements consumed till now
Overdraft entitlements	Licensing model used, current model supports unlimited overdrafts. (Not applicable for Perpetual license)
Overdraft consumed	Different between entitlements available entitlements consumed. (Not applicable for Perpetual license)

The screenshot shows a 'License details' window with a table containing the following data:

Product name	Start date	Expiry date	Entitlements allocated	Entitlements consumed	Overdraft entitlements	Overdraft consumed
Link Framework	15-June-2020 12:00	Perpetual	0	0	0	0
Unica Campaign	13-June-2020 12:00	30-June-2021 12:00	1	2000	Unlimited	1999
Unica Deliver	15-June-2020 12:00	16-August-2020 12:00	5	45	Unlimited	40
Unica Interact	13-June-2020 12:00	30-June-2021 12:00	1	300	Unlimited	299
Unica Journey	25-May-2020 12:00	Perpetual	100	498	Unlimited	398
Unica Optimize	13-June-2020 12:00	30-June-2021 12:00	0	0	0	0

A 'Cancel' button is located at the bottom right of the window.

1. License details page will only show HCL Unica products active entitlements.
2. There can be more than one active entitlements for same product. All active entitlements and entitlements which are having start date in future are also displayed on this License details page.
3. In case of multiple active entitlements for same product, all active entitlements gets consumed one by one. In this case, available entitlements gets consumed from all active entitlements and then overdraft entitlements gets consumed. The order in which entitlements will be picked is random.

## Usage Report

Clicking on the Usage Report tab opens a dialog box that provides detail information on per day entitlement consumption on the associated device. Enter a date range and click the Search button to view the usage report of the mentioned dates range. By default, the current date range is set to January,1st of current year to current date. The pop-up displays the list of Unica products you have opted for along with the entitlement consumption count for these products. In case if consumption happen from multiple entitlements in single day, then aggregate count consumption is shown in usage report for that particular day.

You can download the usage report by clicking the Download button. Report will be generated in Pdf format.

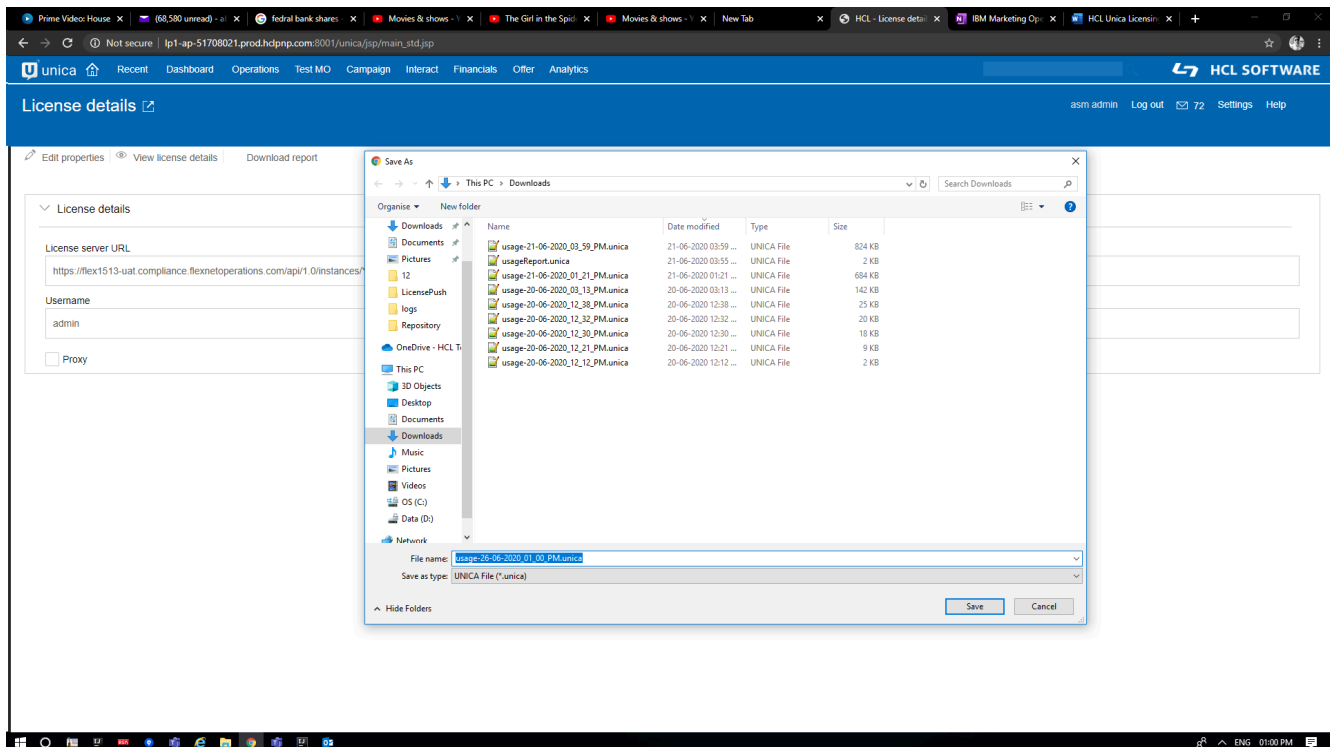


**Note:** From V12.1 Fixpack3 onwards we can search and download usage report.

In case if consumption happen from multiple entitlements in single day, then aggregate count consumption is shown in usage report for that particular day.

## Download Report

When you click the Download report button, a PDF file downloads to your system to the location you specify. Since the file is a PDF file, you need a PDF reader to view the contents of the file.



## Local License Server


You might not be able to connect to cloud-based License server, in this scenario you can have two options as:

1. Connect to cloud license server using proxy connectivity
2. Connect to Local License server

Flexera provides the capability to use the local license servers when you are not willing to connect to the cloud license server. User will need to configure the local license with HCL Unica products before start using, when users access the Unica Platform login URL – it will get redirected to the license configuration page. The user needs to configure the license details on this page. Unica Platform will validate the license and on a successful license, the configuration user will be redirected to the Unica Platform login screen.

High level steps to setup local license server are as below:

1. Contact to HCL Support and your FNO admin to get the Flexera local license server installer packages and readme
2. Install local license server by following the instructions in readme.txt
3. Create a device with the required entitlements.
4. Download the bin file containing the license details from the device.
5. Import this license details bin file on the local license server.
6. Use local license server details while configuring the license details in HCL Unica platform .

<p>License server url</p>	<p>While connecting to Local License server user will need to provide local license server url in the License server field as mentioned below.</p> <p><code>https://&lt;Locale server IP&gt;:&lt;port&gt;/api/1.0/instances/ &lt;instance ID&gt;</code></p> <p> <b>Note:</b> Here Deviceid is individual user Device Id</p>
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 **Note:**

- For information on other property details, see [License Configuration \(on page 24\)](#). on page 26
- After local license server configuration is complete - you will need to import the local license server certificates in HCL Unica.

If user has SSL enabled setup, then they need to configure license certificate for SSL. Below are the steps to install an SSL certificate for Local license server:

<https://javarevisited.blogspot.com/2012/03/add-list-certificates-java-keystore.html>

\*+

To install certificate :+\*

>> Chrome & hit the URL `https://<host>:<port>/api/1.0/instances/<DEVICE_ID>`

{Customer's license URL}

>> Click on Not secured > certificate > details Tab > select copy to a file > select DER encoded binary X.509 (.CER) > give any name for the file & save to a location which you remember > click finish

>> Copy this file to the machine where platform is installed,(example : /home/abhijit/mycert.cer)

>> Open a terminal to the machine where Platform is installed

>> execute the below commands :

>> cd \$JAVA\_HOME

>> cd lib/security

>> keytool -import -keystore cacerts -file <<The certificaate file location>> (exampe : keytool -import -keystore cacerts -file /home/abhijit/mycert.cer)

>> enter pasword : changeit

>> Truse this certificate [no] : y

To remove a certiticate:

>> If you get that the certificate is duplicate you will have to find the alias first

>> execute the below commands :

>> cd \$JAVA\_HOME

>> cd lib/security

>> keytool -list -keystore \$JAVA\_HOME\lib\security\cacerts

>> pasword : changeit

>> This will display the certificate, search for the certificate with owner & note doen the "Alias name"

>> keytool -delete -alias <Alias> -keystore cacerts

## Chapter 7. Logging for Licensing

Detail logging for license server connection, updates, expiry, etc. is logged in Unica Platform log file present under <PLATFORM\_HOME>/logs/platform.log. Users will get warning, error, and info type messages related to licensing.

Example 1:

Log message when the licenses are synced from HCL License Portal after every 10 mins and a valid license for Unica Campaign is found:

Found the license for: Unica Campaign, the total entitlement available are: 15 and will expire on 26 June 2019

Example 2:

In case a license is expiring in the next 5 days, the following warning message will be logged.

The product Unica Campaign license is present on the server and will expire 4 days, please renew the entitlements before 26 June 2018

Example 3:

In case a license is already expired for HCL Plan, following warning message will be logged:

The product HCL Plan license is present on the server but has Expired on 22 June 2018.