

Licenses 101: how to create, edit, delete, duplicate, and export a license

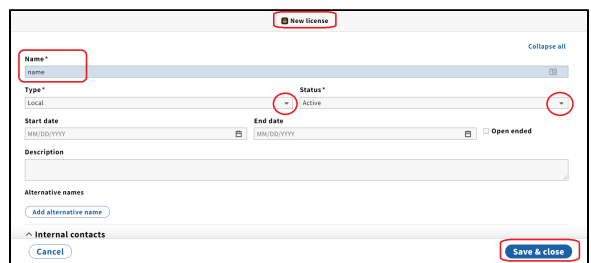
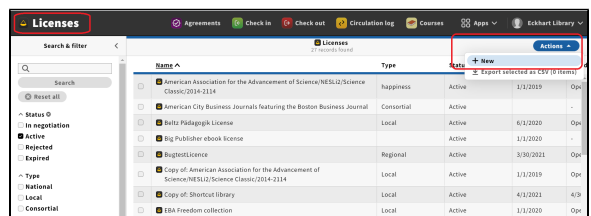
Creating a license

Steps

1	Choose the Licenses App
2	Click the button "new" under the Actions dropdown menu
3	As a minimum fill out the required fields (marked with an asterisk)
4	Save & close the new license

Expected Result

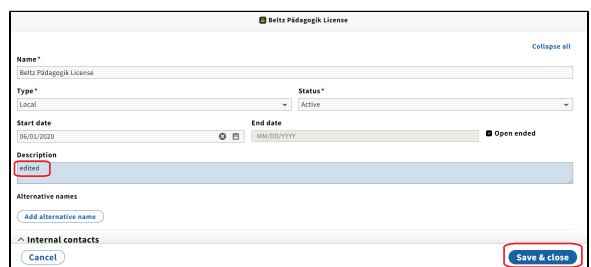
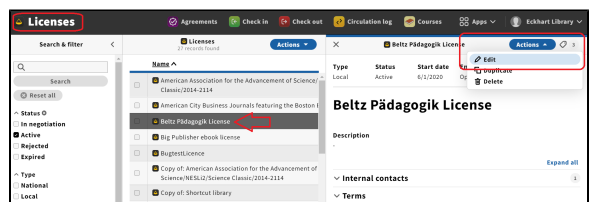
Successfully save a newly created license



Editing a license

Steps

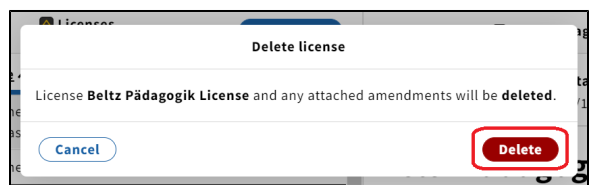
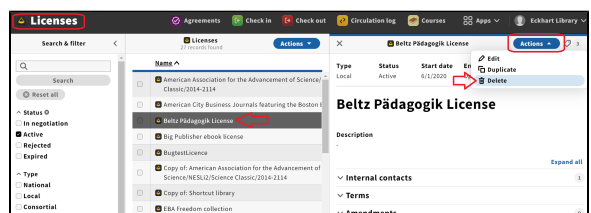
1	Go to the Licenses app and select the license to edit
2	Click the "edit" button under the Actions dropdown menu
3	Choose the field to be edited and edit
4	Click the "Save & close" button



Deleting a license

Steps

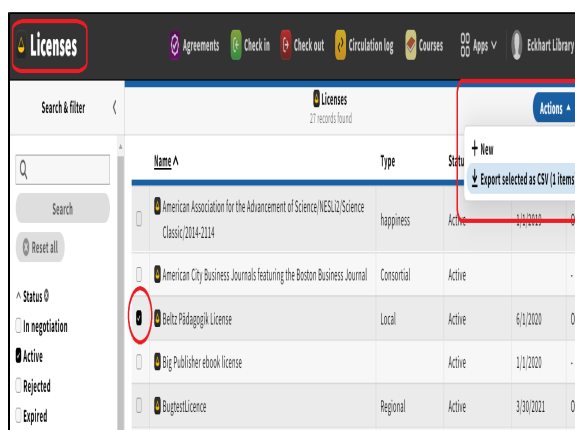
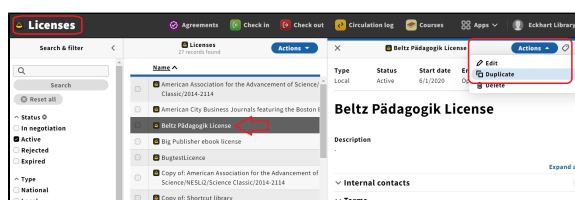
1	Select license in Licenses app
	Expected Result
	License open in view pane with "Actions" menu displaying
2	Choose "Delete" from the Actions menu dropdown
	Expected Result
	Delete confirmation dialogue is shown
3	Click Delete
	Expected Result
	License successfully deleted



Duplicate a license

Steps

1	Open Licenses App and select an existing License Expected Result License shows in view pane with Actions dropdown displaying
2	Choose Duplicate from Actions menu Expected Result Duplicate license dialogue displayed
3	In Duplicate license popup, select the checkboxes for items you want duplicated
4	Click "Save and Close" Expected Result License duplicated and opened in Edit view All desired data copied from original license New license name is name of duplicated license prefixed with "Copy of: " *Files are not copied as part of the duplication process. Any documents with file attachments in the original license will be copied without a file attachment



Exporting a license

Steps

1	Open License app Expected Result License app opens
2	In the search results pane, select the license(s) you want to export by using the checkboxes Expected Result Able to select licenses
3	From the "Actions" menu at the top of the search results choose "Export as CSV" Expected Result Export options display
4	Check the boxes next to the license information you want to include in the export Expected Result Name, Start date, End date, Status, Type are selected
5	Click "Save and close" Expected Result CSV downloaded

