

IAITAM ACE

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How to start preparing your
software agreement & entitlement
data for a SAM tool

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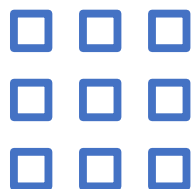
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Agenda

- Where to start
- Data Elements
- Base License Position
- On-going Purchases
- Key Takeaways





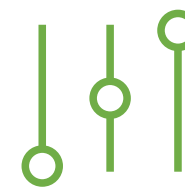
What data do you
currently have?



What format
is it in?



How accurate
is it?



How complete
is it?



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Data Elements



Essential



Recommended



Business data



Reviewing the Data Further

Essential - Agreements

- Agreement Name/Number
- Publisher
- Agreement Type (Software License/Maintenance)
- Legal Entity
- Automatic Upgrades (Yes/No)
- Subscription Agreement (Yes/No)
- Agreement Begin & End Date

Recommended - Agreements

- Alerts/Notifications
- Publisher
- Contact Information
- Notes/Description
- Terms & Conditions



Reviewing the Data Further

Essential - Licenses

- Application Name, Version, Edition
- Purchase Date
- Legal Entity
- License Metric
- Quantity Owned

Recommended - Licenses

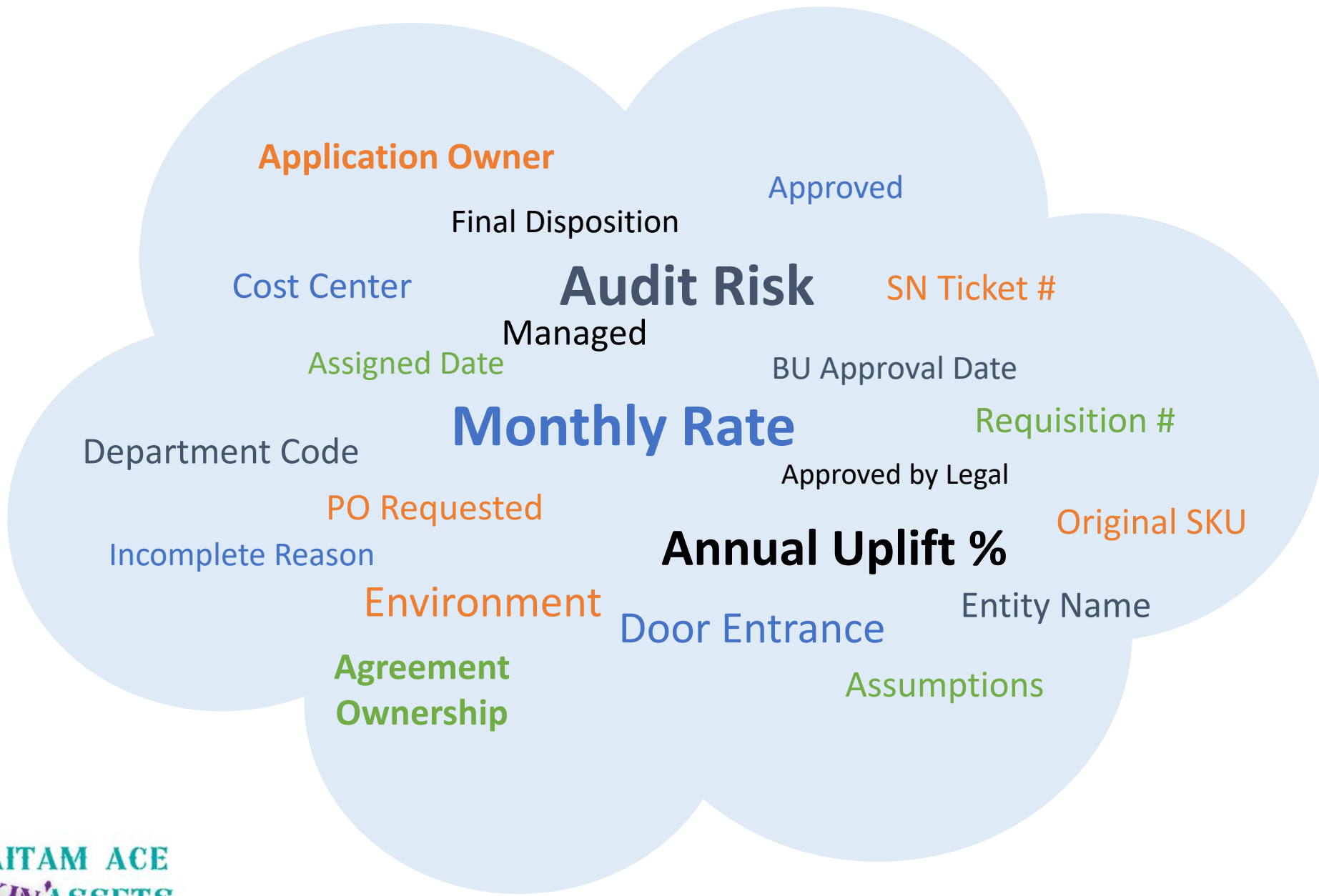
- License Name (if different)
- Upgrade Rights
- Downgrade Rights
- Subscription (Yes/No)
 - Begin & End Date
- Maintenance Begin & End Date
- Cross Edition Rights
- Purchase Price & Currency



“Sometimes letting things go is an act of far greater power than defending or hanging on.”

Eckhart Tolle





Audit Risk

Monthly Rate

Annual Uplift %



Base License Position

Establishing a
Base License Position
is the act of accumulating all past
purchases up until a set point in
time and entering the
consolidated data as a “baseline”
entitlement.



Base License Position – Data Sources

Publisher statements

- Typically include data necessary to establish complete entitlements.

Critical data elements include:

- **Application Name** with current version and edition
- **Maintenance Dates**

Reseller Reports & Internal Procurement Records

- May not include all the data necessary to establish complete entitlements for compliance.
- Purchases not represented by the Publisher will need to be verified.



On-going Purchases

Once the Baseline for a Publisher is established, **on-going purchases** should be added at regular intervals, so all owned entitlements are represented.



On-going Purchases – Data Sources

Reseller Reports

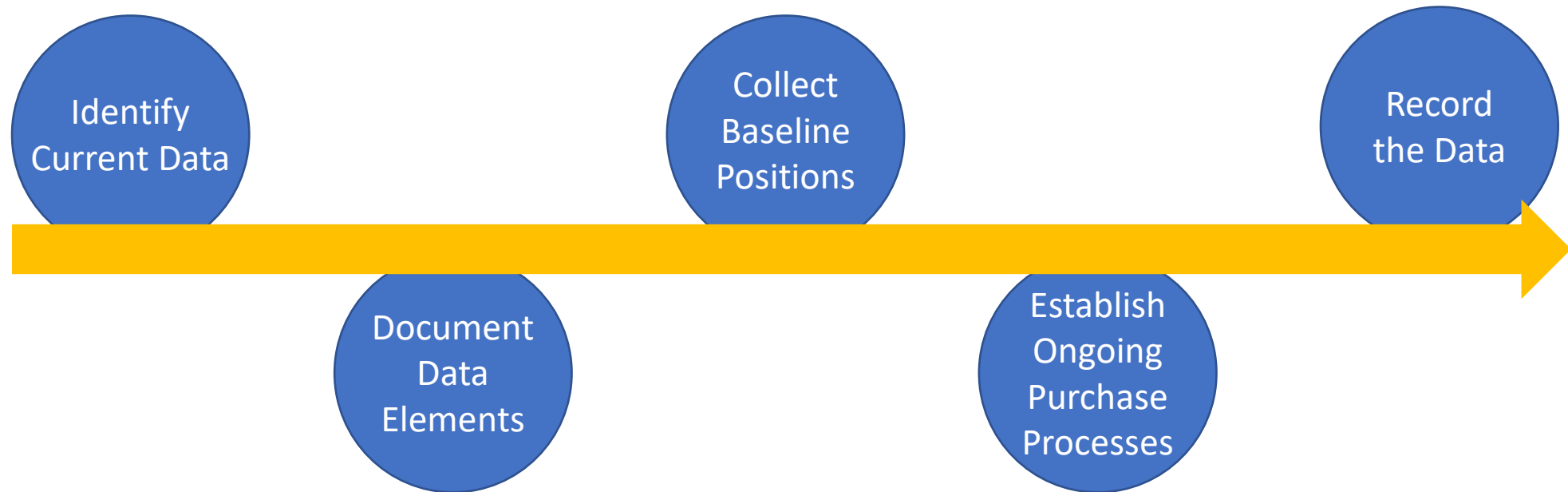
- Auto delivered procurement report from reseller(s).

Internal Procurement Records

- Purchases not made through resellers.



Key Takeaways



“Without questions, there
is no learning.”

- W. Edwards Deming

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