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IAITAM ACE KICKIN' ASSETS SINCE 2002

ACE 2023

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Let's Ride!

Introduction

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Introduction

- **Are you already using a SAM Tool?**

- **Are you are considering a SAM Tool?**

- **Do you just use Excel?**

"You can have all of the fancy tools, but if [your] data quality is not good, you're nowhere."
—Veda Bawo, Director of Data Governance, Raymond James

What's the Destination?

Implement a SAM Tool that can provide you the following:

- On the fly reporting
  - Effective License Positions
  - Compliance Positions
  - True Up workbook creation
  - Renewals – Co-Term's
- Data analysis for remediation recommendations (hardware/software)
- Budget spend (hardware/software)
- Refresh roll out's (hardware/software)
- Software Application Migration
- Decrease your audit risk
- Software consumption/usage trending

Gettin' To The Nitty Gritty

IT

INTERNAL
- Hardware data validation
- Hardware management

SAM TOOL
- Support SAM Tool
- Build connectors/adapters to pull in data
- Help carry out remediation recommendations

Procurement

INTERNAL
- Provides, purchase orders, audit letters, order forms, contracts
- Contract negotiation

SAM TOOL
- Manage contracts
- Document use rights and rules
- Upload purchase orders and complete validation

Product Owners

INTERNAL
- Manage application installations, considering use rights and rules
- Help carry out remediation recommendations

SAM TOOL
- Validate consumption on devices
- Make remediation recommendations

Publisher SME

INTERNAL
- Key contact for position validation
- Understands publisher and application use rights and rules

SAM TOOL
- Validate license rules
- Optimize consumption
- Make remediation recommendations
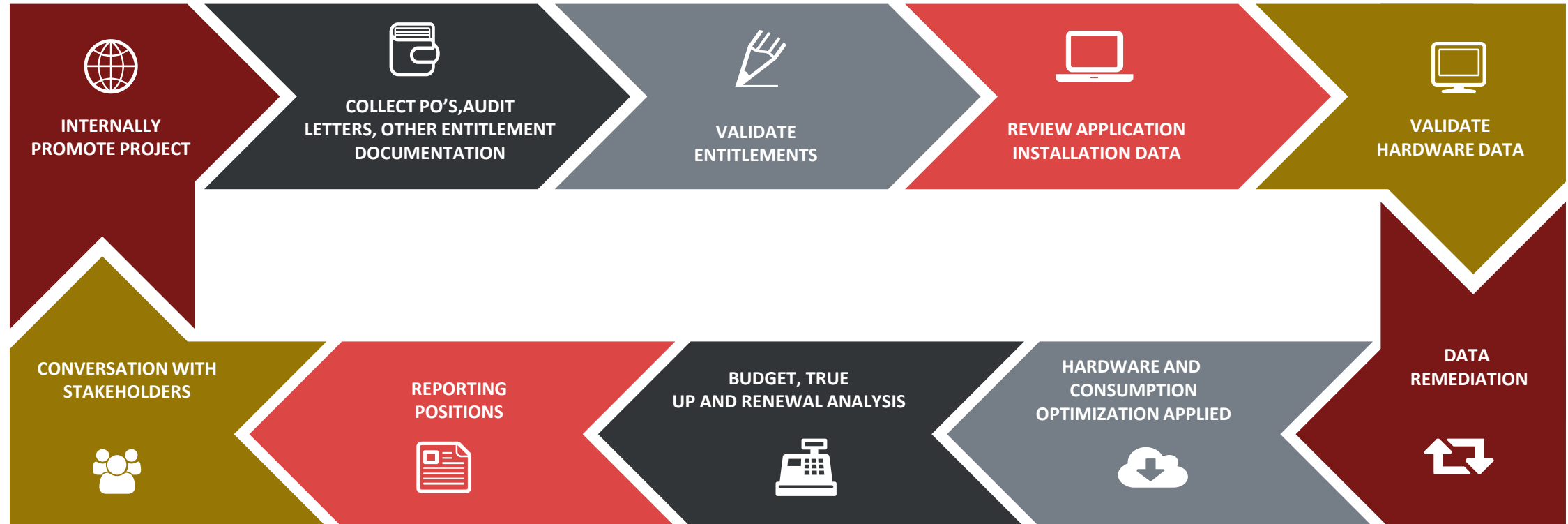- Manage publisher within the SAM Tool

Finance

INTERNAL
- Supplies input for True Up's, renewals, co-term's, budgeting

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Ropin' The Wild West

INTERNALLY PROMOTE PROJECT

COLLECT PO'S, AUDIT LETTERS, OTHER ENTITLEMENT DOCUMENTATION

VALIDATE ENTITLEMENTS

REVIEW APPLICATION INSTALLATION DATA

VALIDATE HARDWARE DATA

CONVERSATION WITH STAKEHOLDERS

REPORTING POSITIONS

BUDGET, TRUE UP AND RENEWAL ANALYSIS

HARDWARE AND CONSUMPTION OPTIMIZATION APPLIED

DATA REMEDIATION

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The Kicker's

Area	What to consider
Connections/ Adapters	• Document the "Golden" source of truth • When pulling from multiple data sources, review the over-write's and what to consider • Validate that they continuously run • Review password changes and lock out's • If the tool is upgraded, do you need to recreate the connection/adapter?
Hardware	• Validate all data fields are populating • CORE's, OS, Processors, Environment • Report Virtual Machines and Clusters • Identify managers of devices
Purchase Orders	• Before loading ALL purchase orders, review what can be used to create a baseline/full position • Review you purchase order system, validate that the line descriptions have the SKU description • Use the *publisher* SKU's not the reseller SKU's • Pull in as much data as possible from the purchase order
Publisher SME's	• Have a clear understanding of the applications and contract use rights and rules • Understand how to optimize a consumption position
Publishers	• Establish a relationship with publisher in order to keep up with changes in licensing and upcoming product releases

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Wranglin' The herd

- ❑ **Buy in from stakeholders**
  - ❑ C-level
  - ❑ Procurement/contract management
  - ❑ Product owners
  - ❑ Publisher SMEs

- ❑ **SAM Tool Implementation**
  - ❑ Types of Connection/Adapters needs
    - ❑ AD/HR
    - ❑ SCCM – other data collection sources
    - ❑ RV Tools/VMware
    - ❑ Publisher portals
  - ❑ Data collection validation (did you connect to all the sources?)
  - ❑ Set up runbook to keep SAM Tool up and running

- ❑ **Hardware validation for all fields being collected**
  - ❑ CORE's/Processor/Model
  - ❑ Environment

- ❑ **Purchase Orders**
  - ❑ Baseline OR full entitlement upload

- ❑ **Application installation verse consumption**
  - ❑ Managing licensable products
    - ❑ Could include freeware & components
    - ❑ Games/home
  - ❑ Set up runbook to keep compliance position updated

Riding Off Into The sunset

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