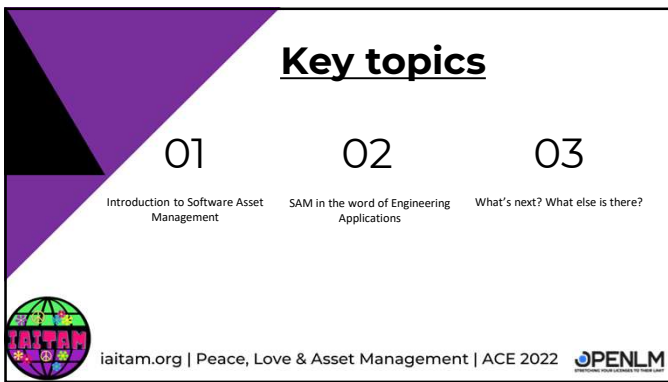




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Chapter 01

Introduction to Software Asset Management



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IMPORTANT POINTS

1. Starting with SAM
2. Key advantages of SAM
3. Key requirements of SAM
4. Differences in approach



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STRETCHING YOUR LICENSES TO THEIR LIMIT

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Starting with Software Asset Management


Many companies around the world are yet to discover the importance of managing software assets

Wake up call usually comes in the form of a software audit and compliance findings


Prevention is better than cure

So how to start?

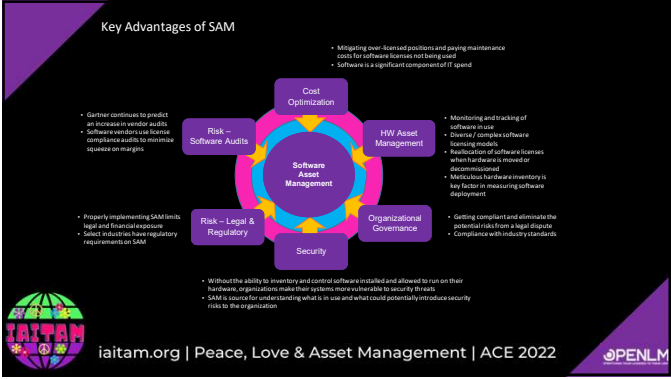
- Software Asset Team should be established
- Software Asset tool should be picked and deployed
- Software Assets have to be managed



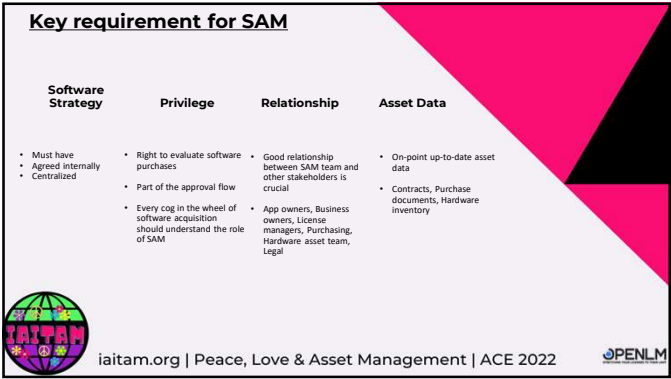
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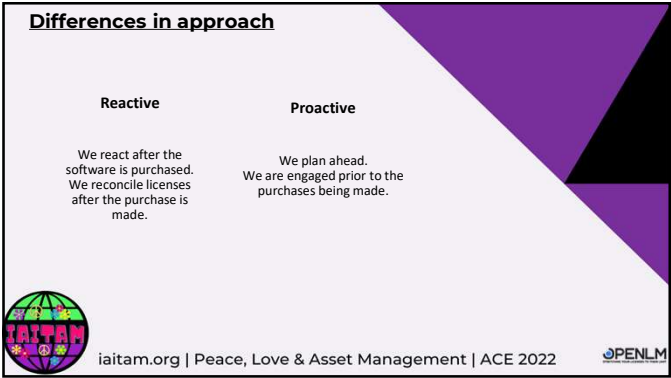
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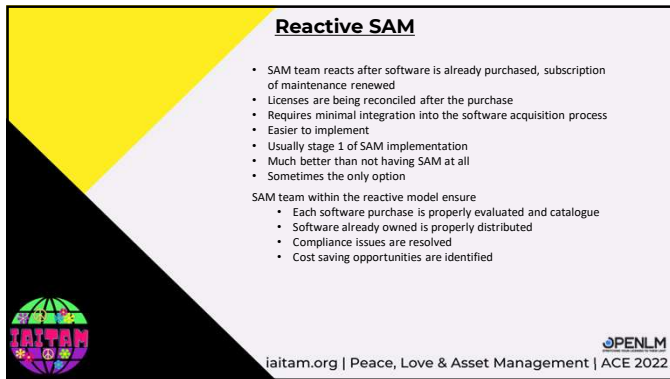
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Reactive SAM

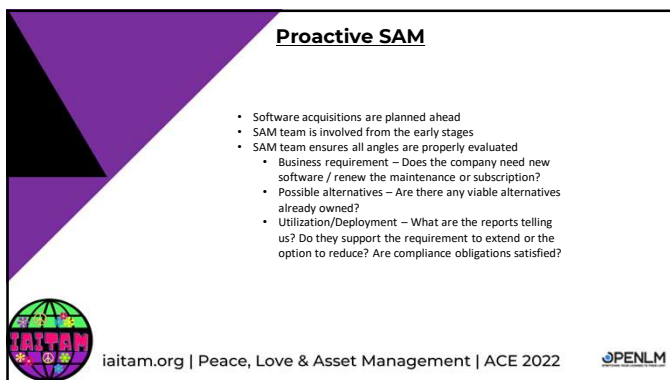
- SAM team reacts after software is already purchased, subscription of maintenance renewed
- Licenses are being reconciled after the purchase
- Requires minimal integration into the software acquisition process
- Easier to implement
- Usually stage 1 of SAM implementation
- Much better than not having SAM at all
- Sometimes the only option

SAM team within the reactive model ensure

- Each software purchase is properly evaluated and catalogue
- Software already owned is properly distributed
- Compliance issues are resolved
- Cost saving opportunities are identified

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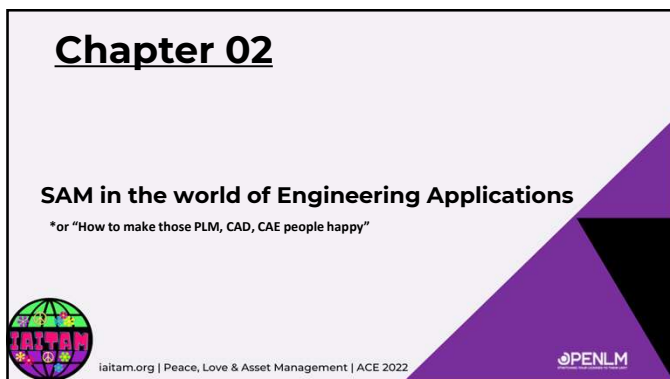


Proactive SAM

- Software acquisitions are planned ahead
- SAM team is involved from the early stages
- SAM team ensures all angles are properly evaluated
 - Business requirement – Does the company need new software / renew the maintenance or subscription?
- Possible alternatives – Are there any viable alternatives already owned?
- Utilization/Deployment – What are the reports telling us? Do they support the requirement to extend or the option to reduce? Are compliance obligations satisfied?

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Chapter 02

SAM in the world of Engineering Applications

*or “How to make those PLM, CAD, CAE people happy”

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IMPORTANT POINTS

1. Engineering software – overlooked sibling

2. What's common & What's different

3. Key metrics



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Engineering software – Overlooked sibling

- Why overlooked?
- Easy to discuss implementing SAM in theory
- Requires a lot of resources
- Staged deployment
- Best way to kick-off → analyze key software spenders
- Core IT contracts – most obvious (Microsoft, IBM, Oracle)
- Expansion of SAM scope → usually after the basics have been established
- PLM, CAD, CAE start to be covered as well
- Key software spenders from engineering (Siemens, Dassault, Autodesk, Bentley, Petrel, Altair, Ansys)




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
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What's common? & What's different?

Core IT Software	
Entitlement	What do we own
Deployment	What is deployed
License model	per user, per core, per device, PVU, RVU
Effective License Position	Entitlement vs Deployment / Optimization & Compliance
Compliance Issues	Overdeployment
Usage	Rarely measured





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What's common? & What's different?



Engineering Software	
Entitlement	What do we own
Allocation	What is being allocated
Usage	What is being used
Editing	Comparing "use" vs "active use"
Reversing	Automatic license revoking
Effective License Position	Different manner of application- Analysis of usage, actual usage and allocation
Compliance issues	By Geography Per device vs Per user Per user- status (internal vs contractor)

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Entitlement – Purchase models



- Similar metric for both worlds
- Purchase of the software has to be recorded
- Prevalent purchase models
 - PLC+ALC
 - Perpetual license with periodical (usually annual maintenance)
 - Upgrades & Support tied to maintenance
 - Software becomes owned
 - Subscription
 - Paid periodically (monthly, quarterly, annually)
 - Upgrades & Support included
 - Canceling subscription waives right to use the software

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Entitlement – License models


- Network Concurrent
 - Most prevalent
 - Centralized network license repository
 - Does not allow to use more copies than entitled
 - Measuring deployment is meaningless
- Network Named
 - Hand in hand with concurrent
 - Centralized network license repository
 - License assigned to user or computer
 - After period of inactivity license assigned back to pool
- Network Token
 - Pool of tokens instead of individual licenses
 - Each application start or function uses certain amount of tokens
 - Disposable tokens
 - Reusable tokens
- Non-network Named
 - Becoming popular
 - Vendors are pushing it forward
 - Each user requires a license
 - Can be hard to manage and inefficient

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Allocation

- Which license allocated and to whom
- Important metric for Named license models (network & non-network)
- Examples – Autodesk subscription, Dassault Named users, Adobe Document Cloud, Adobe Creative Cloud
- Last Used – important reporting value that allows reshuffling/reassignment of licenses instead of purchasing new ones




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Usage

- What and how is being used
- Bread and butter of SAM Manager responsible for Engineering licenses
- No matter the license model - Usage is primary metric to be tracked
- For Network models
 - Usage gathered from central network license server
 - Listening on network ports of license managers
 - Monitoring log files written by license managers
- For Non-network models
 - Usage can only be gathered by tracking end-points (Workstations)
 - More complicated to deploy
 - Security and Data privacy has to be taken into account
 - Vendors pushing this model
 - What will the future bring?
 - Will the centralized network model fade away?



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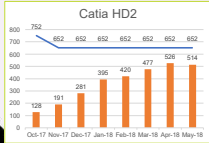


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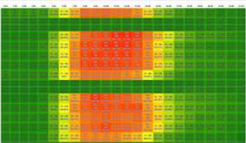
Usage – What and how we track?


- For Network Concurrent model
 - Peak Usage vs Quantity Owned
 - Heat Map
 - Follow the sun policy for global licenses

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


Month	Usage
Oct-17	128
Nov-17	191
Dec-17	281
Jan-18	395
Feb-18	420
Mar-18	477
Apr-18	528
May-18	514






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Usage – What and how we track?


- For all models
 - Session data
 - Start of session, end of session, length of session
 - Who used what, when and for how long
- Denial reports
 - Extremely important
 - Users not getting licenses = User not being able to work = company losing money
 - Also shows possible misconfiguration (allow, deny rules not placed correctly)



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Idling


- Standard usage monitoring shows whether a license is being checked/application running
- Common practice for users is to leave applications running even when they are not working
- Be if a coffee break, lunch break, laptop at the office or at home running non-stop
- This is called idling – license used but application is not
- Another variable to look at when optimizing licenses
- Enables further cost reduction, improves user behavior
- Harder to measure than standard usage
- Requires component on the end user device
- Security and Data privacy needs to be taken into account



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


License Harvesting

- Recycling/Returning license to the pool
- Natural extension of Idling measurement
- Automated systems to suspend/close/kill applications remotely based on certain thresholds
- Enables even further optimization
- Requires a component on the end user device



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Effective License Position

- Can be created in the Engineering world as well
- Deployment is mostly meaningless
- Analysis of Entitlement vs Usage vs Actual Usage (Idling)

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Compliance Measurement

- Defined by contract
- Pre-defined usage scope of licenses
 - By Geography – Site, Country, Region
- Device or User
 - Important especially in today's global world
 - VDI is a factor
 - Frequently missing definition in contract
 - Grey area
- Employee status
 - Contractor vs internal employee
- Deployment mostly meaningless
- Audit will focus on measuring the usage scope
- Compliance can be enforced by defining rules
- Most industry standard license managers allow authorization rules (FlexLM, DSLS, LMX, BetaLM)
- Complicated to setup within big corporate environments
 - Multiple usage scopes together
 - Overlapping requirements
- A proper monitoring setup aligns group usage tracking where groups are aligned with the usage scopes defined in contracts

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Chapter 03

What's next? What else is there?

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World is constantly evolving

- Push by vendors to move from on-premise network licensing model
- Cloud licensing being the new trend
- What will the future bring?


- Things are coming full circle
- From 80s with computer mainframe and remote terminals
- To Early 2000s with end-user computers with enough computing power to accommodate demanding operations
- Today with high penetration of broadband internet and computing power of the cloud



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Web-based applications

- Possible to start offering CAD applications through web interface
- AutoCAD in browser
- Is CATIA or NX next?
- Siemens Active Workspace trying to supplement Teamcenter rich client
- Will we see a full move on the browser and cloud?
- Which licensing model will become valid?
- How do we keep the licenses under control?



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In-house application development

- Companies incorporate home-grown applications into the pool
- Easy to develop with Visual Studio or Mendix
- Another pool of software to track




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Future of Network licenses?

- Will the network model survive the test of time?
- Will it become obsolete?
- Is a hybrid model the future?
- Are we moving everything to cloud?
- What do you think?



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