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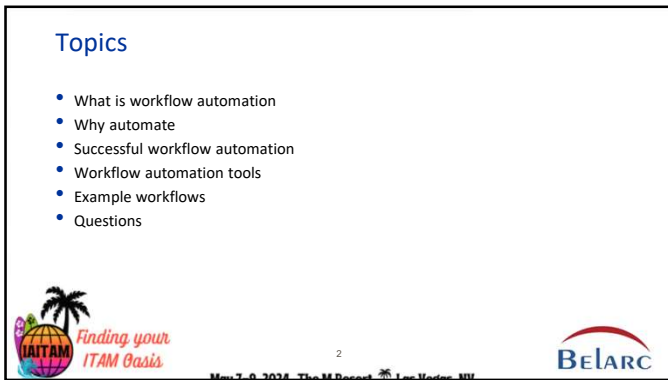
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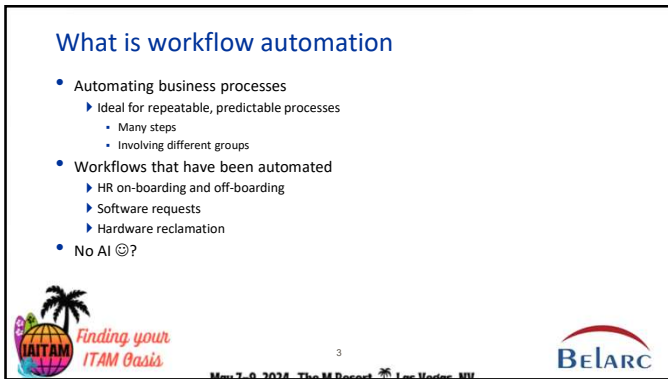
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### Why automate

- Improve efficiency and reduce errors
- Compliance with business processes & regulations
- Improved communication among different groups
- Cost savings
- Enhanced visibility
- Improved customer service
- Improved data security



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### Why automate now

- More processes are based on digital data
- Many choices in automation tools
- Many out-of-the box templates



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### Successful workflow automation

- Selecting the right workflows
  - ▶ Largest impact on the organization
  - ▶ Effort required to automate workflow
  - ▶ Start small
- Selecting the right people
  - ▶ Management & contributors
- Continuously monitor and improve
  - ▶ Statistics & personal feedback



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**Successful workflow automation**

- Starts with the data
  - Automated, accurate, up-to-date
  - For SAM this means
    - Detailed hardware
    - Detailed software and actual usage
    - Vulnerable and EOL software
- Data format
  - Can be almost any format even Excel spreadsheets ☺).
  - Should be automated, accurate and up-to-date
  - Usually in a common database format, such as SQL Server.

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**Steps to implement workflow automation**

- Identify and define the workflows to automate
  - Ideal for repeatable, predictable processes
  - Processes with the largest business impact
  - Ease of implementation
- Design the workflow
  - Involve a dedicated team to improve the process
  - Make the workflow independent of specific people
- Test and deploy the workflow
- Monitor performance and improve the workflow
  - Continual improvement

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**Workflow automation tools**

- Hive, Smartsheet, Monday, Jira, Zapier, Trello, Asana, Nintex,...
- Our SAM & HWAM workflow examples use Microsoft Power Automate
- Decide on a tool based on
  - Templates for the processes you wish to automate
  - Interfaces to your apps or data sources
    - SAP, Oracle, Salesforce, Stripe, etc.

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### Workflow automation examples

- HR on-boarding & off-boarding
- Software requests
- Hardware reclamation
- Unauthorized, vulnerable & EOL software



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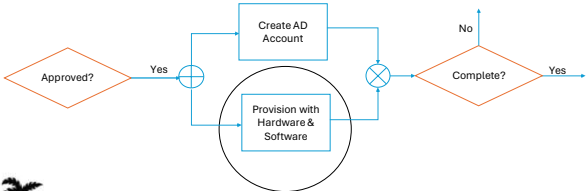
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### Employee On-boarding Example



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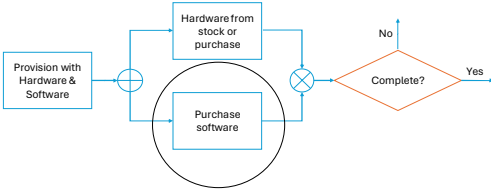
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### Employee On-boarding Example



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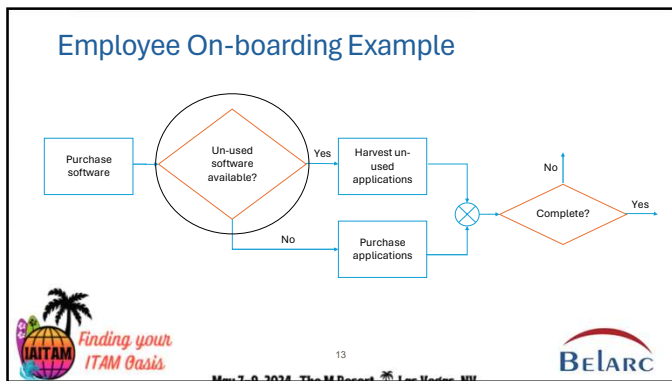
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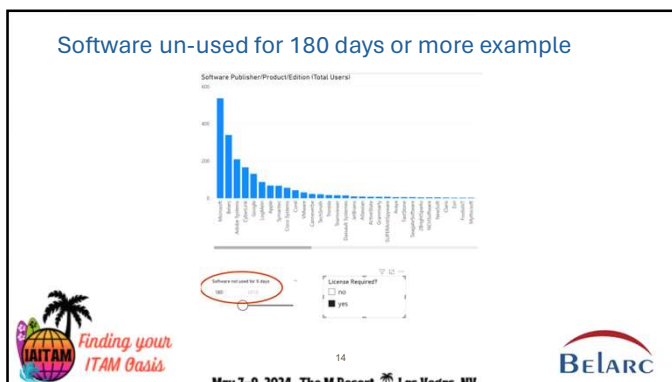
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### Microsoft un-used software example

Company	Product	Edition	Version	License Model	Login/Idler	LastUsedTimestamp	Computer Name	LastUsedTimeComputer
Microsoft	Microsoft 365	Apps for enterprise	56	cloud user	moharp	1/1/2024 12:56:00 AM	BANRS077D0W	1/1/2024 12:56:00 AM
Microsoft	Visual Studio	Professional	2022	cloud user	patfrs	10/29/2023 12:30:00 PM	T0MPCDGAJ20	10/29/2023 12:30:00 PM
Microsoft	Microsoft 365	Apps for enterprise	56	cloud user	zhanga	10/21/2023 7:23:00 PM	BESB06WCE	10/21/2023 7:23:00 PM
Microsoft	Microsoft 365	Apps for enterprise	56	cloud user	ranjar	10/21/2023 1:12:00 PM	SIN6VPP0992	10/21/2023 1:12:00 PM
Microsoft	Visual Studio	Professional	5022	cloud user	gordml	10/20/2023 9:06:00 AM	AD6KPP9F0F01	10/20/2023 9:06:00 AM
Microsoft	Project	Professional	5016	device	ledam	10/20/2023 6:36:00 AM	AD2KPF0RNDU	10/20/2023 6:36:00 AM
Microsoft	Visual Studio	Professional	2022	cloud user	leeml	10/19/2023 9:10:00 PM	AD2K15443612467	10/19/2023 9:10:00 PM
Microsoft	Visio	Professional	5016	device	perf06	10/18/2023 4:51:00 PM	AD6KPF0320Y	10/18/2023 4:51:00 PM
Microsoft	Visio	Unknown	5021	device	lall	10/18/2023 8:46:00 AM	SPCP117083	10/18/2023 8:46:00 AM
Microsoft	Visual Studio	Professional	5019	cloud user	khata	10/17/2023 4:23:00 PM	SP4K0R0842	10/17/2023 4:23:00 PM
Microsoft	Visio	Unknown	5021	device	katelo	10/17/2023 3:47:00 PM	NACFC14HV3H	10/17/2023 3:47:00 PM
Microsoft	Project	Unknown	5021	device	vanmarm	10/17/2023 10:33:00 AM	R2MPPQ2LVH	10/17/2023 10:33:00 AM
Microsoft	Visual Studio	Professional	5019	cloud user	zhulian	10/17/2023 9:12:00 AM	HAKNDV022	10/17/2023 9:12:00 AM
Microsoft	Project	Professional	5016	device	siwon	10/17/2023 6:41:00 AM	AD2KAPCE1K49	10/17/2023 6:41:00 AM
Microsoft	Visio	Unknown	5021	device	sikding	10/17/2023 3:17:00 AM	AD2KAPW018R0N	10/17/2023 3:17:00 AM
Microsoft	Project	Unknown	5021	device	sikahy	10/16/2023 6:08:00 PM	T0MPCDGN0A	10/16/2023 6:08:00 PM
Microsoft	Visio	Professional	5016	device	catalin	10/16/2023 8:12:00 AM	AD2KAPCD1S0NB	10/16/2023 8:12:00 AM

This data is automatically sent to Power Automate and a service ticket is created.

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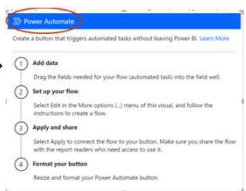
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### Creating workflow with Power Automate



Data from Power BI:

- Un-used software to harvest
- Software to provision to employees
- Software to update or remove
- Users to add or remove from AD
- Hardware to provision or reclaim



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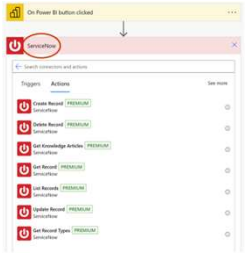
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### Creating workflow with Power Automate



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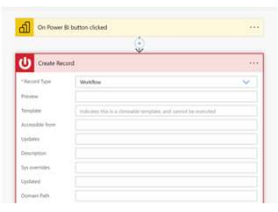
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### Creating workflow with Power Automate



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### Creating workflow with Power Automate

The screenshot shows the Power Automate 'Connectors and Actions' pane. A search filter is applied, and several connectors are listed. The 'Send an email (V3)' connector is highlighted with a red circle. Below the pane, there are logos for 'Finding your ITAM Basis' and 'BELARC'.

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### Creating workflow in Power Automate

The screenshot shows the Power Automate 'Connectors and Actions' pane. A search filter is applied, and several connectors are listed. The 'Send an email (V3)' connector is highlighted with a red circle. Below the pane, there are logos for 'Finding your ITAM Basis' and 'BELARC'.

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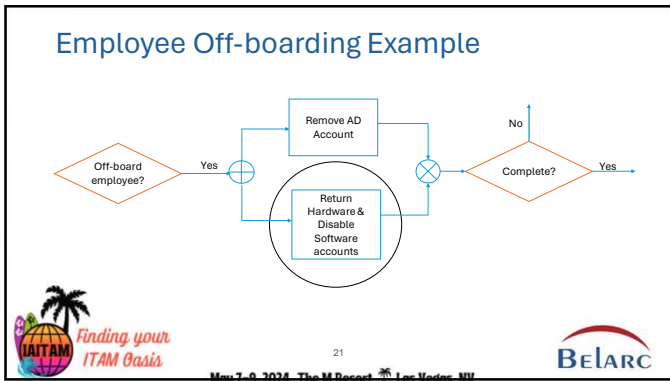
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### Employee Off-boarding Example

Request return all hardware

Check for all Hardware assigned to User

Hardware returned?

No

Yes

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**BELARC**

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### Hardware from Discovery database

Systems List

Computer	Login User	System Make	System Model	MachineClass	MachineType	OS Name	OS Version	OS Edition	PrimarySerialNumber
desk_2503	1011	ASUS	All Series	Workstation	P	Windows	10	Professional (x64)	131220223004790
desk_1314	1011	Dell	OptiPlex 3920	Workstation	P	Windows	10	Professional (x64)	79C1382
desk_2506	1011	Dell	Vostro 470	Workstation	P	Windows	10	Professional (x64)	34217411

This data is automatically sent to Power Automate and a service ticket is created.

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**BELARC**

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### Employee Off-boarding Example

Remove all software logins

Check for all software assigned to User

All software logins removed?

No

Yes

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**BELARC**

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### Adobe un-used software

Computer	User	Email	Product	Edition	Version	License Type	Last Used Date (By Computer)	Last Used Days Ago (By Computer)	Last Used Date (By User)	Last Used Days Ago (By User)
desk_1004	11401	bdpym.fmpchj@...	Illustrator	None	C56	cloud user	5/23/2021	500	5/23/2021	360
desk_1146	11401	bdpym.fmpchj@...	Illustrator	None	2015	cloud user	10/10/2021	360	10/10/2021	360
nb_985	23913	yewadx.vkxknh...	Acrobat	Pro DC T	2018	cloud user	10/13/2021	357	10/13/2021	357
nb_985	23913	yewadx.vkxknh...	InDesign	None	C56	cloud user	11/17/2021	322	11/17/2021	322
nb_985	23913	yewadx.vkxknh...	Photoshop	None	C56	cloud user	11/23/2021	316	11/23/2021	316
desk_2290	142990	dhyvzco.qjzeto@...	Photoshop	None	C53	cloud user	12/21/2021	288	12/21/2021	288
nb_449	23248	wavagd.vtbgvrvk...	Captrate	None	11	cloud user	1/13/2022	285	1/13/2022	285
nb_449	23248	wavagd.vtbgvrvk...	Creative Cloud All Apps Pro	Enterprise	2020	cloud user	2/26/2022	221	2/26/2022	221
desk_387	25217	vaar.afhhuqcw...	Acrobat	Pro DC T	2020	cloud user	4/19/2022	169	4/19/2022	169
desk_387	25217	vaar.afhhuqcw...	Creative Cloud All Apps Pro	Enterprise	2020	cloud user	4/27/2022	161	4/27/2022	161

This data is automatically sent to Power Automate and a service ticket is created.

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### Hardware reclamation example

```

    graph LR
    A([Identify computers that have not reported and not returned.]) --> B[Email reminder to user to return hardware]
    B --> C{Hardware returned?}
    C -- No --> A
    C -- Yes --> D[ ]
  
```

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### Hardware reclamation example

ComputerName	LegitUser	Email	SystemManufacturer	SystemModel	EnclosureType	SystemSerialNumber	ChassisAssetTag	Computer UUID
Steve's MacBook Pro	stevemahall		Apple	MacBookPro11,1		FVFT48D205F		0239K24-EE29-5A8F
Aaron's MacBook Pro	aaronsevern		Apple	MacBookPro16,1	Laptop	C02CF13JMDGT	A4491831-26C5-5DC1	33061916-91A6-5732
ACS's MacBook Pro	andrianagutierrez		Apple	MacBookPro15,2	Laptop	C02CF13JMDGT		9F797A2A-5D41-5355
ACS's MacBook Pro	estevan		Apple	MacBookPro16,2	Laptop	C0256NHLMB5	50086600-4CC8-5308	E33E1495-0433-5E8C
Aditya's MacBook Pro	sangha		Apple	MacBookPro16,1	Laptop	C02FFJQMDGN		7D0581D-6365-5578
admin's MacBook Pro	admin		Apple	MacBookPro11,3	Notebook	C02HRAW1GJGD		8F7F4796-5A62-523A
admin's MacBook Pro	admin		Apple	MacBookPro16,1	Laptop	C02FK4KMDGT		8C826644-0025-5E31
admin's MacBook Pro	ramam		Apple	MacBookPro14,3	Laptop	C02WV26JHTDF		3A842644-87DC-5268
administrator's MacBook Pro	adit		Apple	MacBookPro16,1	Laptop	C02ZRWQMDGN		

Not reported in 30 days and not returned computers.  
This data is automatically sent to Power Automate and a service ticket is created.

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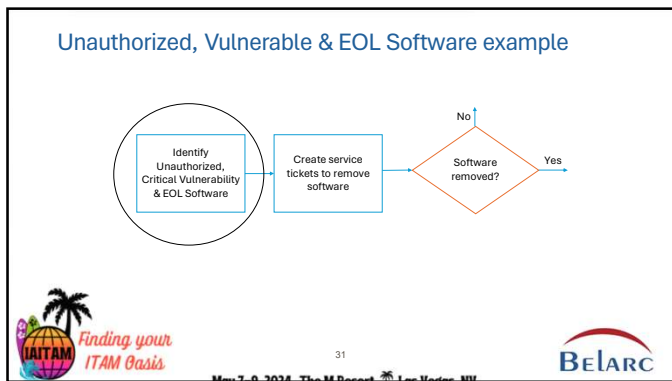
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### Unauthorized, Vulnerable & EOL Software example

Hotfixes Needed

Computer Name	BulletinID	Severity	Vendor	Version	Description
desk_391	CpuApr2020	EOL	Oracle	Java 6.0.20.9 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_862	CpuApr2020	EOL	Oracle	Java 6.0.20.6 32-bit	Oracle Critical Patch Update Advisory - April 2020
nb_190	CpuApr2020	EOL	Oracle	Java 6.0.21.0 7 32-bit	Oracle Critical Patch Update Advisory - April 2020
svr_1844	CpuApr2020	EOL	Oracle	Java 6.0.21.0 9 64-bit	Oracle Critical Patch Update Advisory - April 2020
desk_1633	CpuApr2020	EOL	Oracle	Java 6.0.22.0 4 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_1741	CpuApr2020	EOL	Oracle	Java 6.0.24.0 7 64-bit	Oracle Critical Patch Update Advisory - April 2020
svr_2146	CpuApr2020	EOL	Oracle	Java 6.0.25.0 4 32-bit	Oracle Critical Patch Update Advisory - April 2020
svr_2467	CpuApr2020	EOL	Oracle	Java 6.0.25.0 4 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_549	CpuApr2020	EOL	Oracle	Java 6.0.27.0 7 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_1456	CpuApr2020	EOL	Oracle	Java 6.0.30.0 3 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_1336	CpuApr2020	EOL	Oracle	Java 6.0.43.0 1 32-bit	Oracle Critical Patch Update Advisory - April 2020
nb_647	CpuApr2020	EOL	Oracle	Java 6.0.43.0 1 32-bit	Oracle Critical Patch Update Advisory - April 2020
nb_548	CpuApr2020	EOL	Oracle	Java 6.0.43.0 1 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_1094	CpuApr2020	EOL	Oracle	Java 6.0.45.0 6 64-bit	Oracle Critical Patch Update Advisory - April 2020
svr_1370	CpuApr2020	EOL	Oracle	Java 6.0.45.0 6 64-bit	Oracle Critical Patch Update Advisory - April 2020
svr_961	CpuApr2020	EOL	Oracle	Java 6.0.45.0 6 64-bit	Oracle Critical Patch Update Advisory - April 2020

This data is automatically sent to Power Automate and a service ticket is created.

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- ### Summary
- Workflow automation offers major benefits to organizations of all sizes
    - ▶ Better customer service
    - ▶ Better results and reduced errors
    - ▶ Compliance with regulations
    - ▶ Cost savings
    - ▶ Improved visibility
    - ▶ Better data security
  - SAM can be an integral part of workflow automation
    - ▶ Its all about the data and making it available
    - ▶ Automated, accurate, up-to-date
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**Belarc**

- Over 1,800 customers worldwide
  - ▶ Autodesk, Environmental Protection Agency, Federal Aviation Administration, NASA, Patent & Trademark Office, Department of State, Travelers Insurance, US Air Force
  - ▶ Many long term >10 years
  - ▶ Located in 50 countries
- Eight US and Worldwide Patents
- Founded 1997, privately owned



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**Questions and contact**

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Belarc, Inc.  
[stchen@belarc.com](mailto:stchen@belarc.com)  
[info@belarc.com](mailto:info@belarc.com)  
[www.Belarc.com](http://www.Belarc.com)



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