

# IAITAM ACE 2025

ITAM - Another Brick In The Wall

Workflow Automation  
the future of ITAM



# Topics

- What is workflow automation
- Why automate
- Successful workflow automation
- Workflow automation tools
- Example workflows
- Questions & Lessons Learned from audience



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# What is workflow automation

- Automating business processes
  - ▶ Ideal for repeatable, predictable processes
- Workflows that have been automated
  - ▶ Employee on-boarding and off-boarding
  - ▶ Software requests
  - ▶ Hardware reclamation
  - ▶ Entering purchase records
- No AI 😊?



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# Why automate

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



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# Why automate now

- More processes are based on digital data
- Many choices in workflow automation tools
- Many out-of-the box templates
- AI can help 😊!



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# Successful workflow automation

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



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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

- Employee on-boarding & off-boarding
- Software requests
- Hardware reclamation
- Unauthorized, vulnerable & EOL software
- Entering Purchase Orders

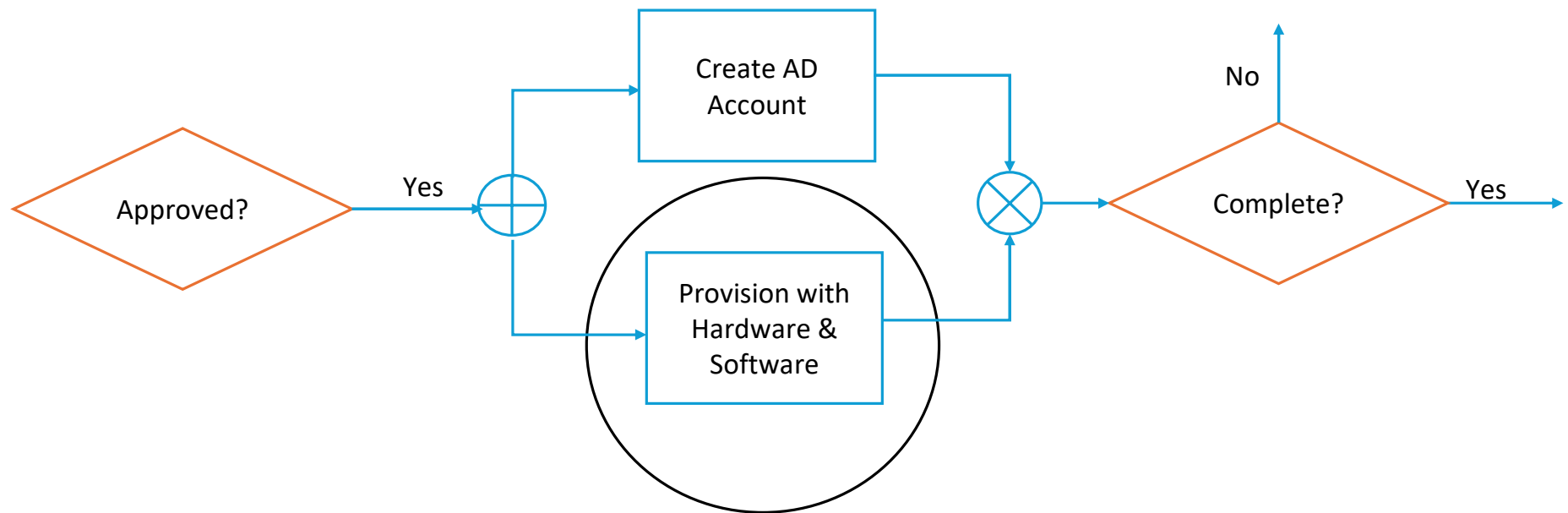


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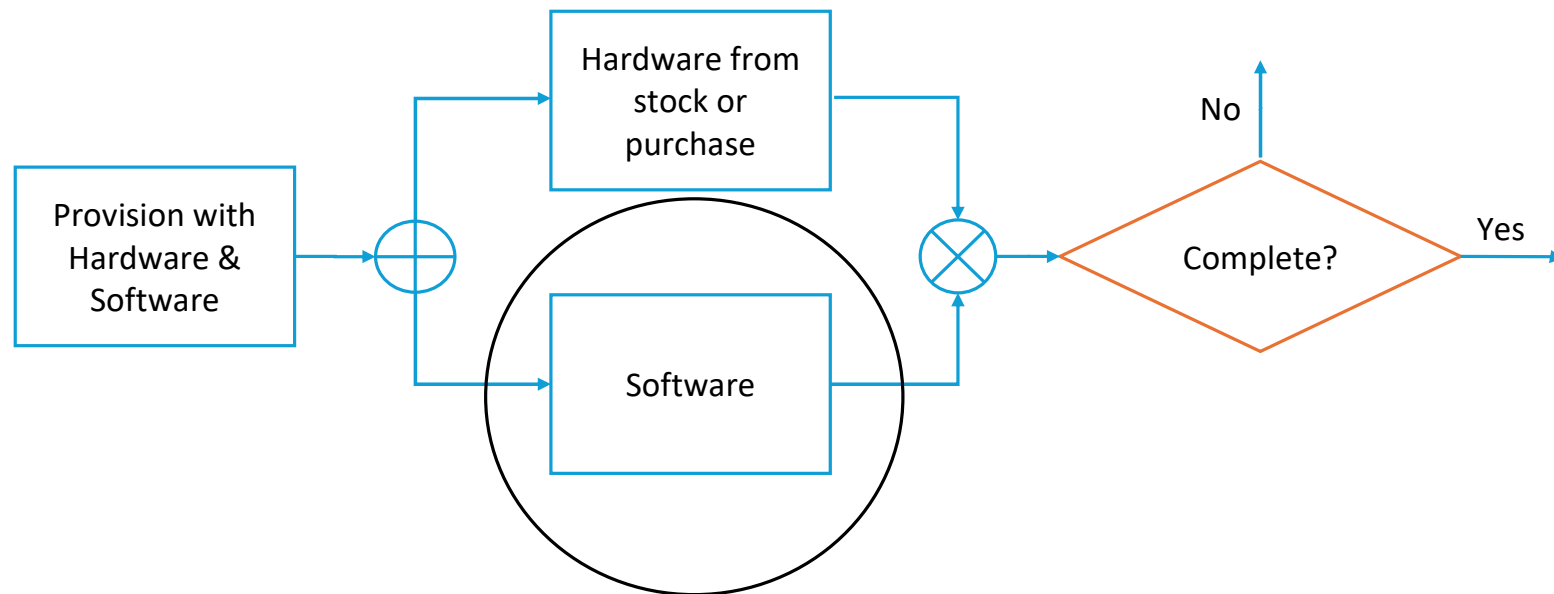
# Employee On-boarding Example



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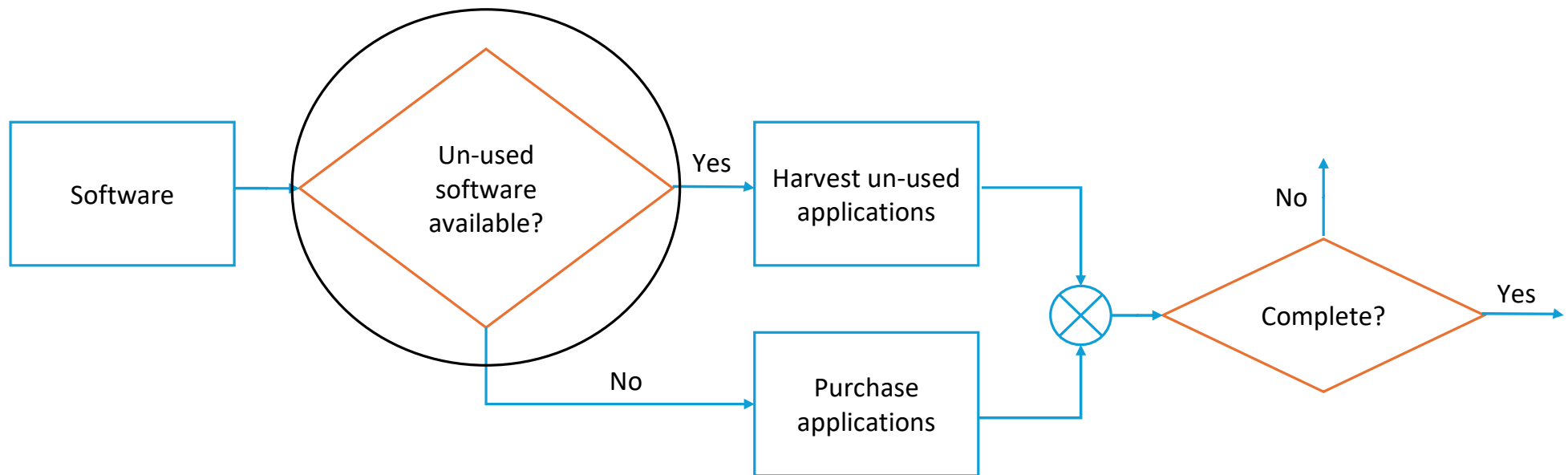
# Employee On-boarding Example



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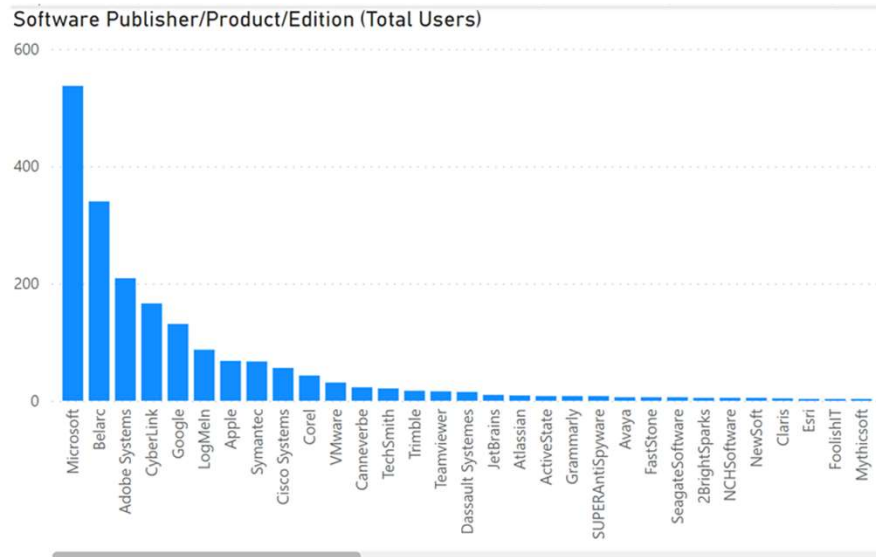
# Employee On-boarding Example



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# Software un-used for 180 days or more example



Software not used for X days

180 6916

License Required?

☐ no

☒ yes

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# Microsoft un-used software example

Company	Product	Edition	Version	License Model	LoginUser	LastUsedTimeByUser	ComputerName	LastUsedTimeComputer
Microsoft	Microsoft 365	Apps for enterprise	16	cloud user	mohanp	1/1/2024 12:56:00 AM	BANR90Y7DEW	1/1/2024 12:56:00 AM
Microsoft	Visual Studio	Professional	2022	cloud user	polifrs	10/23/2023 12:32:00 PM	TORPC0GA1Z0	10/23/2023 12:32:00 PM
Microsoft	Microsoft 365		16	cloud user	zhangxia	10/21/2023 7:27:00 PM	BEI6890MC5	10/21/2023 7:27:00 PM
Microsoft	Microsoft 365	Apps for enterprise	16	cloud user	ranjanr	10/21/2023 1:12:00 PM	SIN6VPW992	10/21/2023 1:12:00 PM
Microsoft	Visual Studio	Professional	2022	cloud user	gorobei	10/20/2023 9:06:00 AM	ADSKPF3FA9F1	10/20/2023 9:06:00 AM
Microsoft	Project	Professional	2016	device	ikedam	10/20/2023 6:36:00 AM	ADSKPF39ND9J	10/20/2023 6:36:00 AM
Microsoft	Visual Studio	Professional	2022	cloud user	leemi	10/19/2023 9:10:00 PM	ADSK11643613457	10/19/2023 9:10:00 PM
Microsoft	Visio	Professional	2016	device	penfolg	10/19/2023 4:51:00 PM	ADSKPF3Z0Q7K	10/19/2023 4:51:00 PM
Microsoft	Visio	Unknown	2021	device	lail	10/18/2023 8:46:00 AM	SFOPF1L7083	10/18/2023 8:46:00 AM
Microsoft	Visual Studio	Professional	2019	cloud user	bhata	10/17/2023 4:23:00 PM	SFO4VS6B42	10/17/2023 4:23:00 PM
Microsoft	Visio	Unknown	2021	device	katelao	10/17/2023 1:47:00 PM	MACPC1M2V1H	10/17/2023 1:47:00 PM
Microsoft	Project	Unknown	2021	device	vanmarm	10/17/2023 10:33:00 AM	REMPF2Q0LVH	10/17/2023 10:33:00 AM
Microsoft	Visual Studio	Professional	2019	cloud user	zhulian	10/17/2023 9:12:00 AM	MAN2VHNS22	10/17/2023 9:12:00 AM
Microsoft	Project	Professional	2016	device	siron	10/17/2023 6:41:00 AM	ADSKPC2EYK49	10/17/2023 6:41:00 AM
Microsoft	Visio	Unknown	2021	device	skidmog	10/17/2023 5:17:00 AM	ADSKPW015RGN	10/17/2023 5:17:00 AM
Microsoft	Project	Unknown	2021	device	takahay	10/16/2023 6:04:00 PM	TOKR90Y3NSA	10/16/2023 6:04:00 PM
Microsoft	Visio	Professional	2016	device	catalis	10/16/2023 8:12:00 AM	ADSKPC2DJSNB	10/16/2023 8:12:00 AM

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



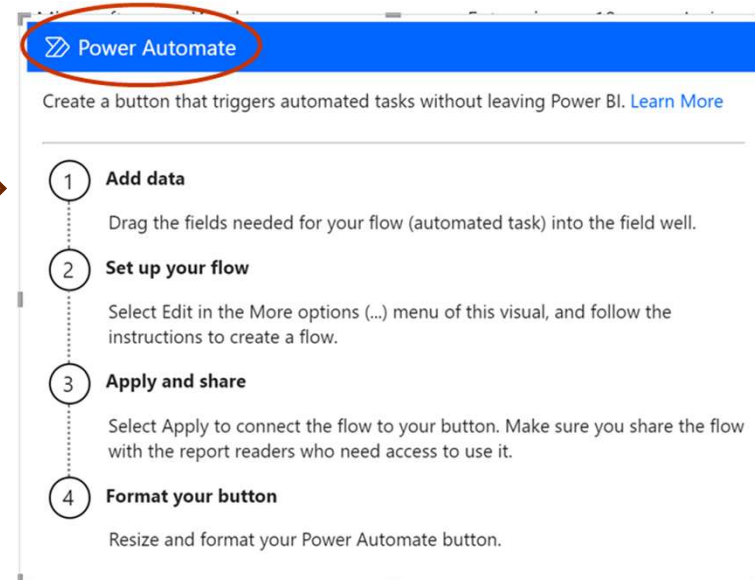
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# Creating workflow with Power Automate

Data from Belarc's BelPower:

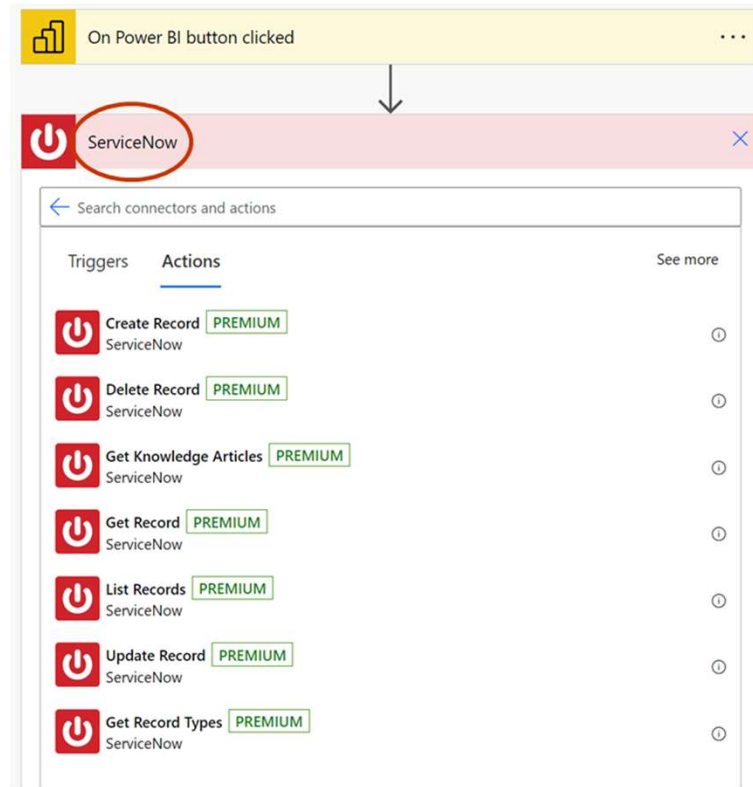
- Un-used software to harvest
- Software to provision to employees
- Software to update or remove
- Users to add or remove from AD
- Hardware to provision or reclaim



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# Creating workflow with Power Automate

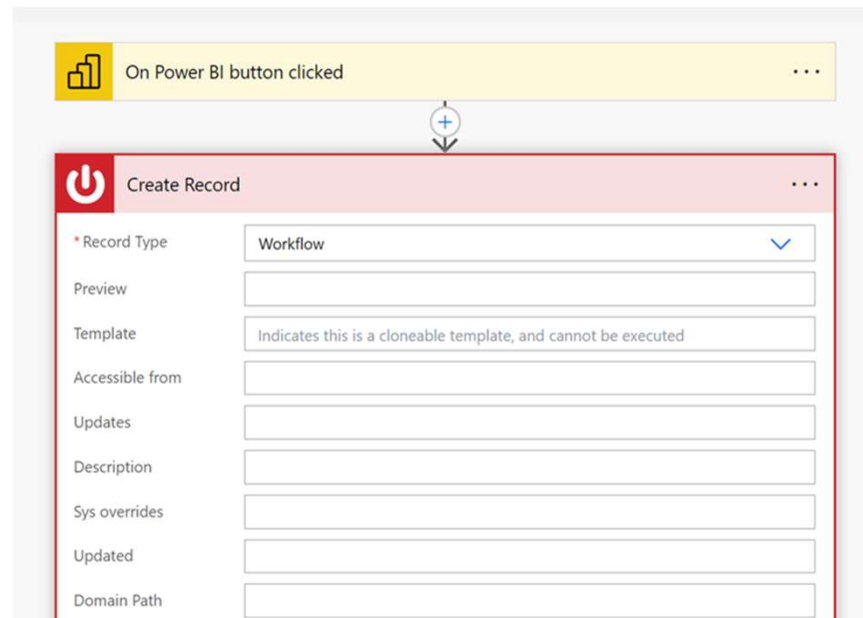


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# Creating workflow with Power Automate



The screenshot shows the 'Create Record' form in Power Automate. At the top, there is a yellow bar with a bar chart icon and the text 'On Power BI button clicked'. Below this, a red bar contains a power button icon and the text 'Create Record'. The form fields are as follows:

Field	Value
* Record Type	Workflow
Preview	
Template	Indicates this is a cloneable template, and cannot be executed
Accessible from	
Updates	
Description	
Sys overrides	
Updated	
Domain Path	

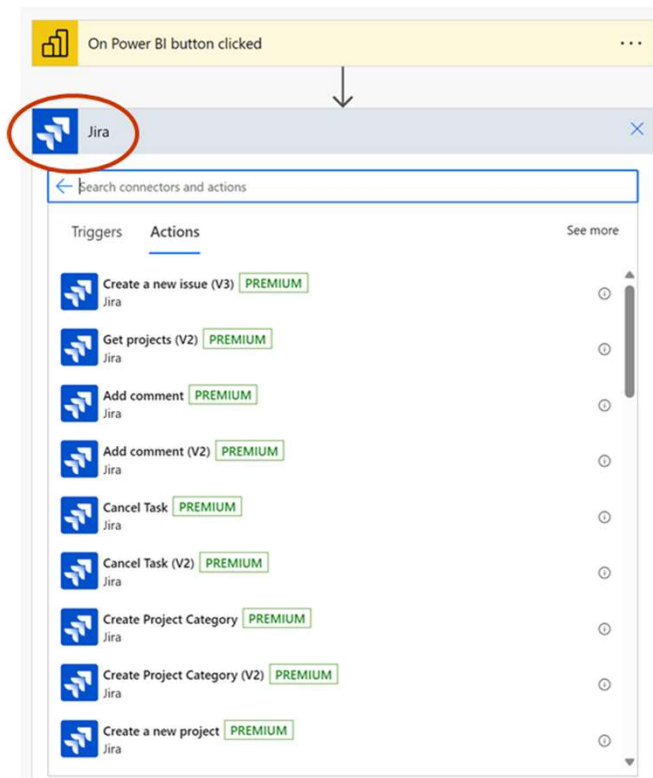


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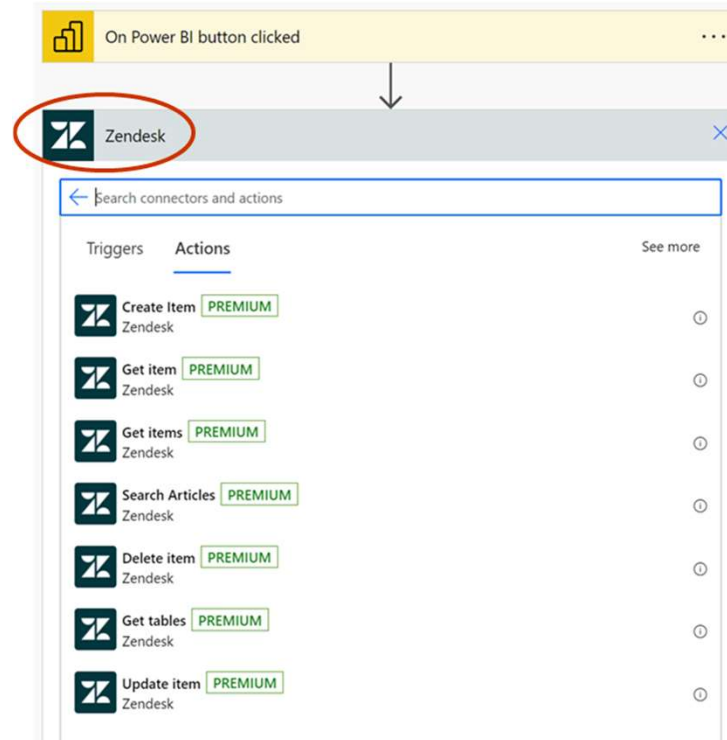
# Creating workflow with Power Automate



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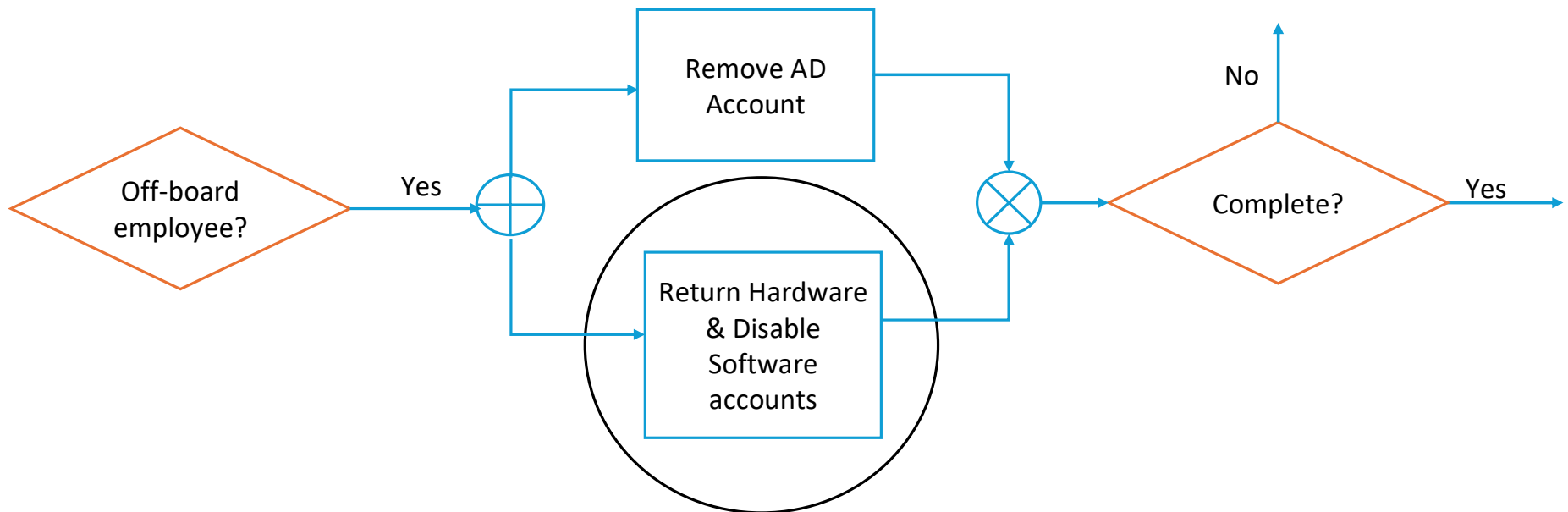
# Creating workflow in Power Automate



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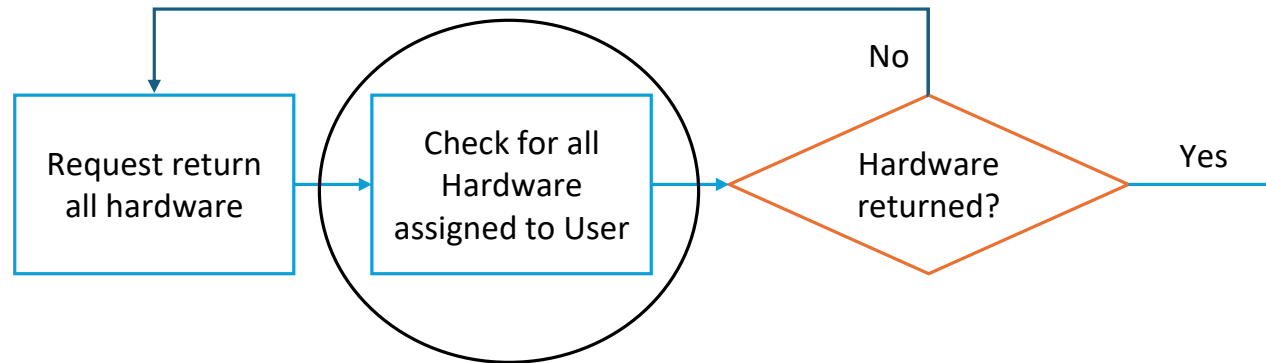
# Employee Off-boarding Example



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# Employee Off-boarding Example



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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 3020	Workstation	P	Windows	10	Professional (x64)	7SC3382
desk_2506	1011	Dell	Vostro 470	Workstation	P	Windows	10	Professional (x64)	342TNW1

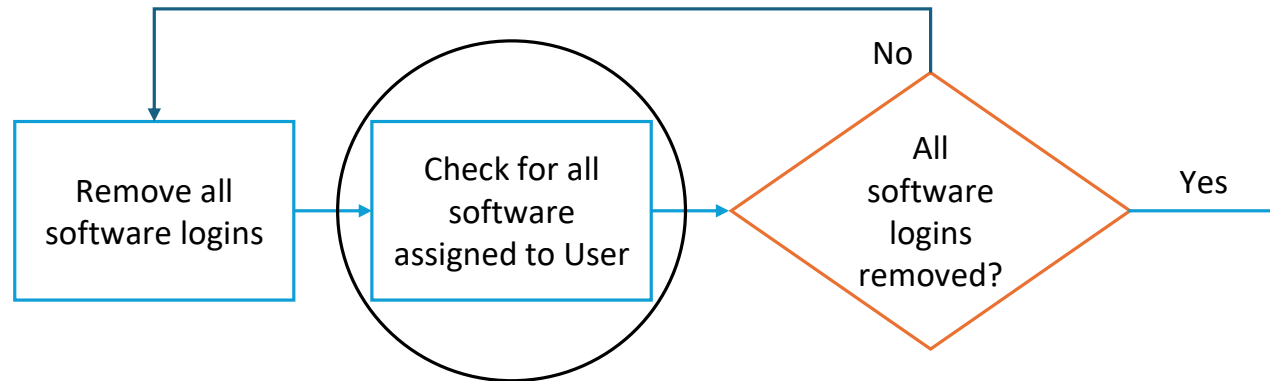
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# Employee Off-boarding Example



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# Software from Discovery database

Company	Product	Edition	Version	License Model	License Required	Subscription Assigned	ProductKey	LoginUser	LastUsedTimeByUser
Microsoft	Windows	Professional	10	device	yes	no		1011	5/6/2020 6:38:00 AM
Microsoft	Windows	Professional	10	device	yes	no		1011	5/6/2020 6:38:00 AM
Microsoft	Windows	Professional	10	device	yes	no		1011	5/6/2020 6:38:00 AM
Belarc	BelMonitorClient	None	8	device	yes	no	3d7a172f	1011	5/6/2020 5:39:00 AM
Google	GoogleEarth Pro	None	7	device	yes	no		1011	3/19/2019 5:00:00 AM
Microsoft	Office	Standard	2019	device	yes	no		1011	3/8/2019 7:30:00 PM
Adobe Systems	Photoshop	None	CS2	user	yes	no	1045-1412-5685-1654-6343-1431	1011	4/18/2016 6:44:00 PM
Adobe Systems	Lifecycle Designer	None	9002	user	yes	no		1011	
Autodesk	z??? AutodeskSketchBookDesign r2013	None	2013	user	yes	no	393-39499945	1011	
Cisco Systems	Webex Meetings	None	10032	user	yes	no		1011	
CyberLink	PowerDirector	None	12	device	yes	no	MES150728-02	1011	
CyberLink	PowerDVD	None	9	device	yes	no	DVD101202-02	1011	
Microsoft	Project	Standard	2010	device	yes	no	6Q7Y8-J8XX8-CP4DP-9PXDF-	1011	

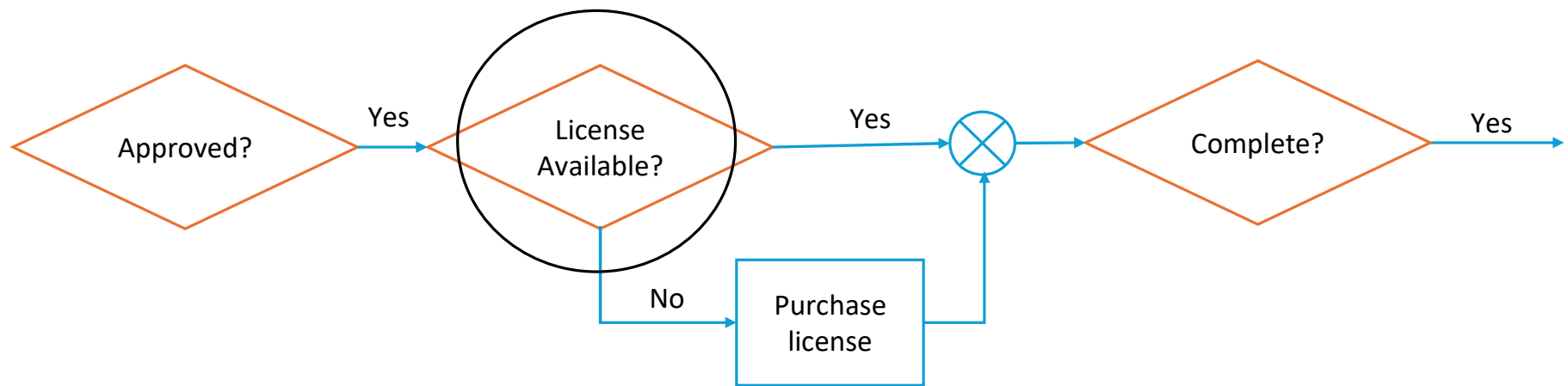
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# Software Request Example

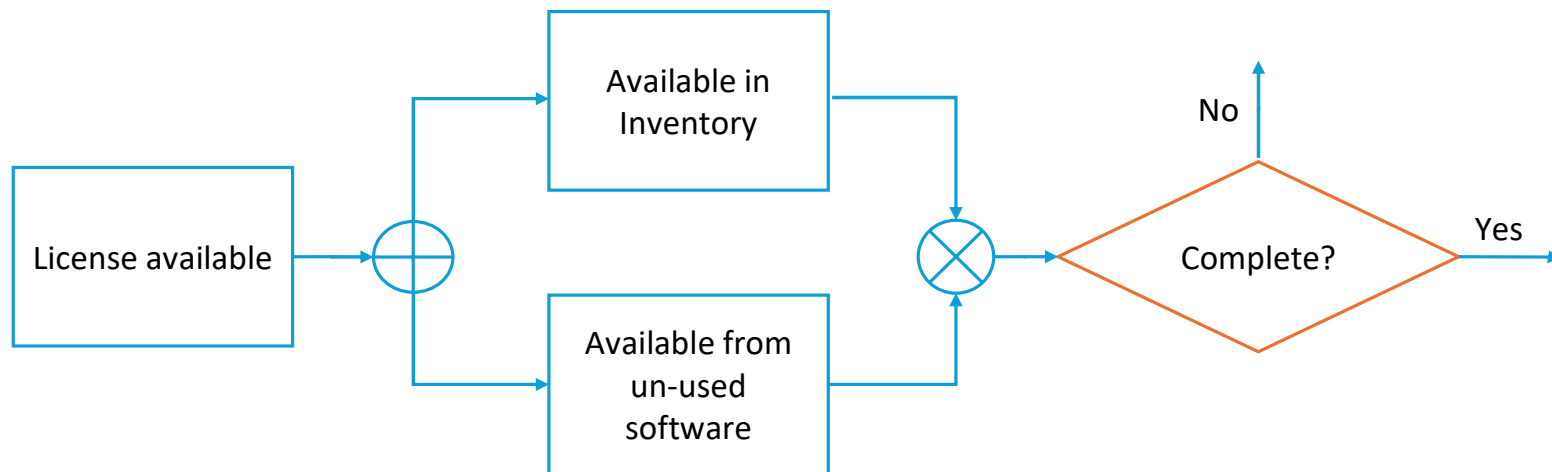


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# Software request example



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# Adobe un-used software

ScriptProduct	ScriptType	ScriptUserDomain	ScriptCountry	Product	Edition	Version	LicenseType	LoginUser	LoginUserEmail	LastUsedTime
All Apps	Adobeld	abcxyz	USA	Creative Cloud All Apps	Enterprise	2020	cloud user	39578	39578@abcxyz.com	05/05/2020
All Apps	Adobeld	abcxyz	USA	Creative Cloud All Apps	Enterprise	2020	cloud user	116130	116130@abcxyz.com	04/30/2020
All Apps	Adobeld	abcxyz	USA	Creative Cloud All Apps	Enterprise	2020	cloud user	131309	131309@abcxyz.com	04/14/2020
Photoshop	Adobeld	abcxyz	USA	Photoshop	None	2020	cloud user	107561	107561@abcxyz.com	03/06/2020
All Apps	Adobeld	abcxyz	USA	Creative Cloud All Apps	Enterprise	2020	cloud user	13278	13278@abcxyz.com	03/05/2020
InDesign	Adobeld	abcxyz	USA	InDesign	None	2020	cloud user	13278	13278@abcxyz.com	03/05/2020
InDesign	Adobeld	abcxyz	USA	InDesign	None	2018	cloud user	13142	13142@abcxyz.com	02/20/2020
After Effects	Adobeld	abcxyz	USA	After Effects	None	2019	cloud user	23248	23248@abcxyz.com	01/21/2020
Illustrator	Adobeld	abcxyz	USA	Illustrator	None	2020	cloud user	112192	112192@abcxyz.com	01/20/2020
Photoshop	Adobeld	abcxyz	USA	Photoshop	None	2019	cloud user	112192	112192@abcxyz.com	01/20/2020

Software not used for X days

License required  
☐ no  
☐ yes

Subscription assigned  
☐ no  
☒ yes

Product Has Subscription  
☐ yes

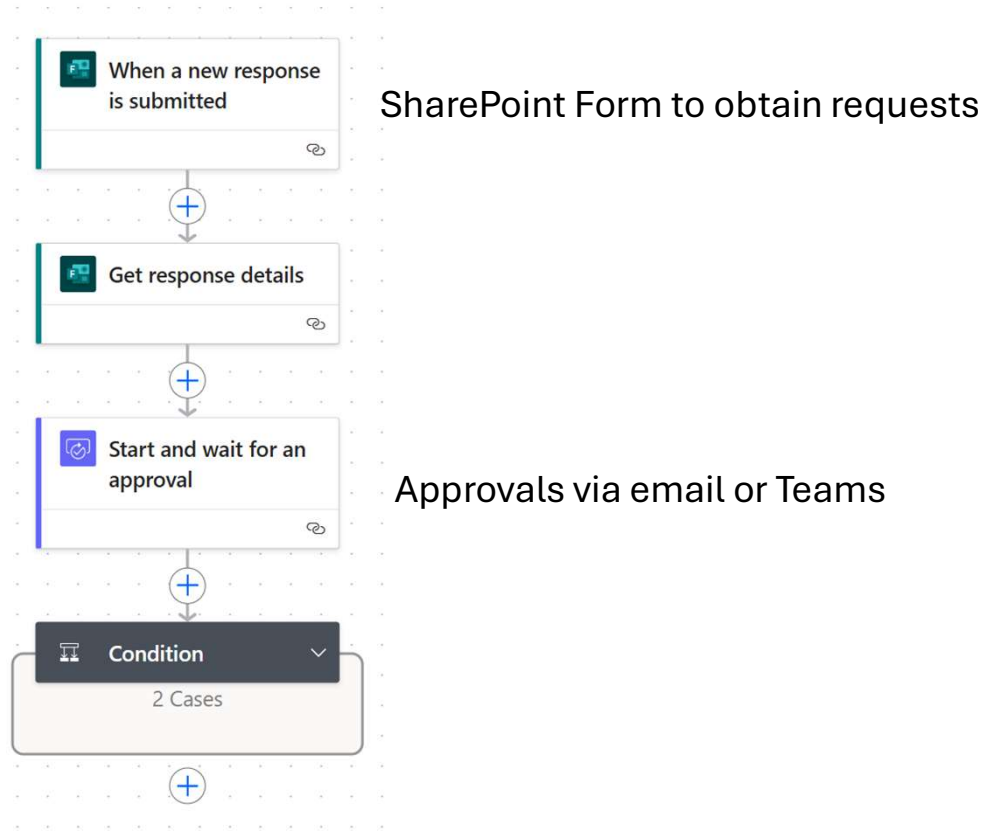
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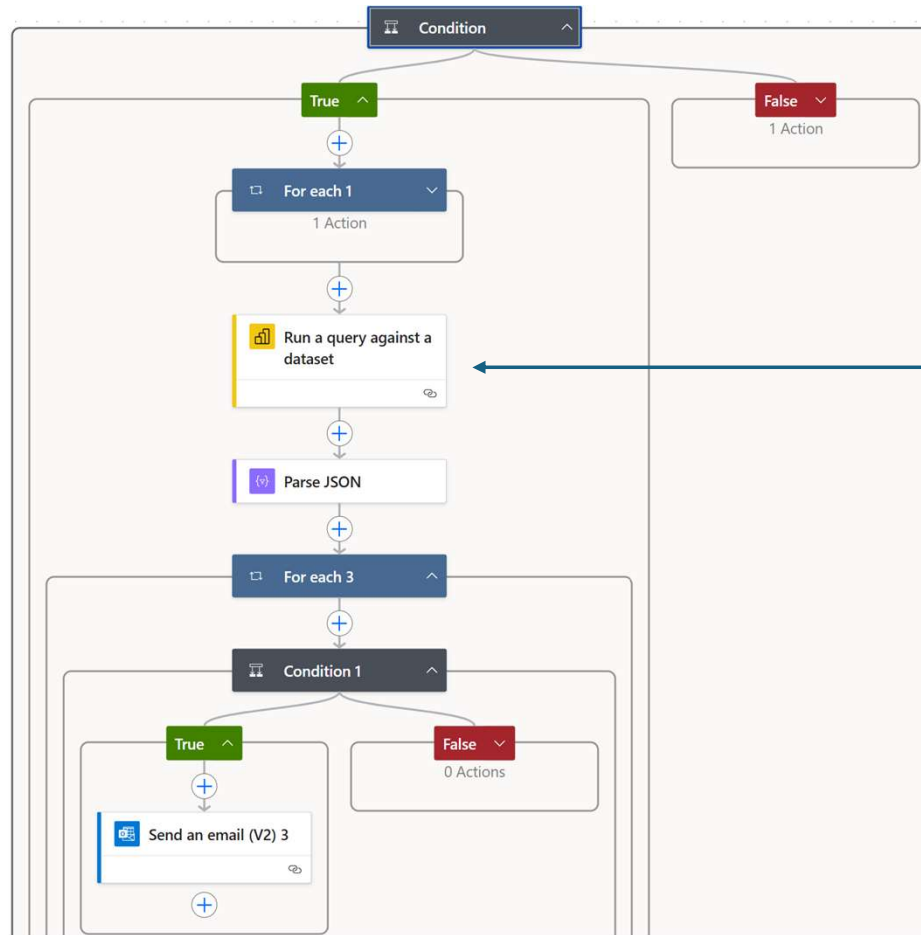
# Software request flow



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# Software request flow



Data from BelPower running on Power BI (Azure)

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# Software request flow - Connectors

- ✓ Connected to **Microsoft Forms**
- ✓ Connected to **Approvals**
- ✓ Connected to **Office 365 Outlook**
- ✓ Connected to **Power BI**
- ✓ Connected to **SharePoint**



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# Software request flow – SharePoint site

## Software Requests dropdown

Hi, Sumin. When you submit this form, the owner will see your name and email address.

1. Adobe Systems

Select your answer

▼
2. ACD Systems

Select your answer

▼
3. Autodesk

Select your answer

▼
4. ESRI

Select your answer

▼
5. Microsoft

Select your answer

▼



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# Software request flow – BelPower on Power BI

Product	Qty Surplus
ACDSee Canvas X	11
ACDSee Photo Studio	18
ACDSee Video Studio	11
After Effects	97
ArcGIS for Desktop	118
AutoCAD Architecture	44
AutoCAD Civil 3D	7
AutoCAD Mechanical	14
Camtasia	552
Creative Cloud All Apps	62
Dreamweaver	99
Illustrator	94
InDesign	94
Office	-1347
Photoshop	83
Postman	83
Premiere Pro	97
Project for Office 365	22
Visio for Office 365	12
Visual Studio	64



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# Software request flow – Flow history on SharePoint

Software request history ☆						
① Response ID	📅 Date/Time	🔍 Request Details	🔍 Approved	🔍 Available in inventory	🔍 Available from harvesting	🔍 Software delivered
	4/9/2025 12:00 AM	Creative Cloud All Apps sumin@tchenhome.com 4/9/2025 2:33:39 PM 51	Approve Approver: Sumin Tchen, sumin@tchenhome.com Response: Approve Request Date: Wednesday, April 9, 2025 2:33:44 PM Response Date: Wednesday, April 9, 2025 2:34:04 PM	Available in inventory {"dw LcCloudAndDesktopLicensesPvsi[Product]":"Creative Cloud All Apps","[SumLicenseQtySurplus]":62} Creative Cloud All Apps 62		
52	4/9/2025 11:06 AM	Office sumin@tchenhome.com 4/9/2025 3:06:01 PM	Approver: Sumin Tchen, sumin@tchenhome.com Response: Approve Request Date: Wednesday, April 9, 2025 3:06:03 PM Response Date: Wednesday, April 9, 2025 3:06:15 PM 2025- 04-09T15:06:16Z Approve	Not available in inventory Office -1347		

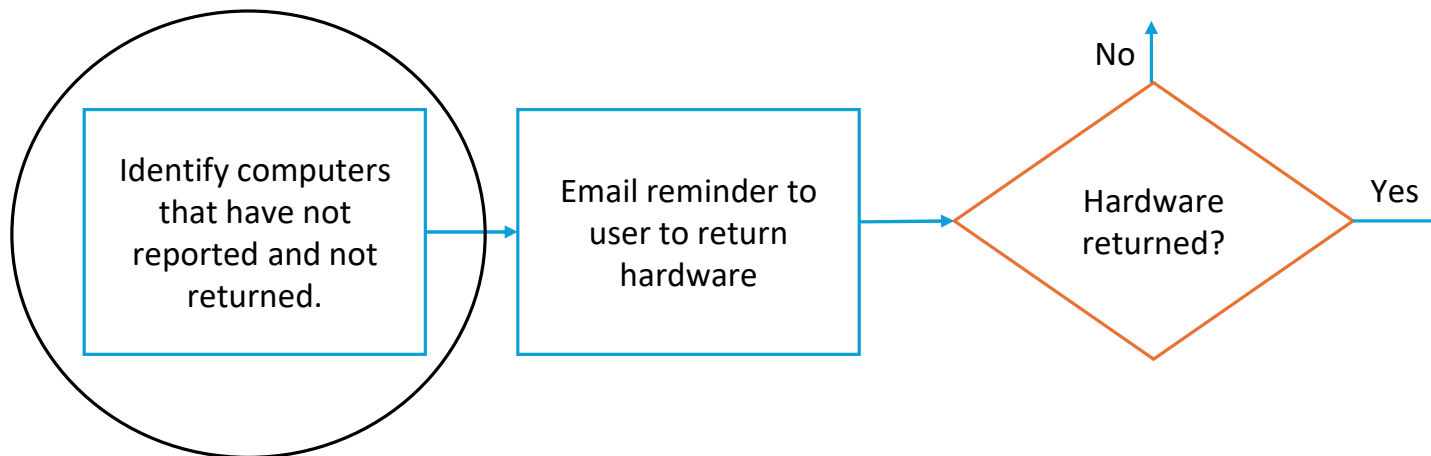


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# Hardware reclamation example



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# Hardware reclamation example

ComputerName	LoginUser	Email	SystemManufacturer	SystemModel	EnclosureType	SystemSerialNumber	ChassisAssetTag	Computer UUID
Steve's MacBook Pro	stevemarshall	Apple	MacBookPro17,1			FVFFT4RDQ05F		02399C2A-FE29-5A9F-
Aaron's MacBook Pro	aaronsevern	Apple	MacBookPro16,1	Laptop	C02CJ1J3MD6T			A4A91831-2AC5-5DC8-
ACS's MacBook Pro	andrianagutierrez	Apple	MacBookPro15,2	Laptop	C02CF31RLVDL			33D61916-91A6-5752-
ACS's MacBook Pro	dwyerj	Apple	MacBookPro16,1	Laptop	C02D70MYMD6T			5F7F767A-5DA1-5355-
ACS's MacBook Pro	eckenhj	Apple	MacBookPro16,2	Laptop	C02D56NHML85			5608E600-4CCB-5308-
Aditya's MacBook Pro	sanghia	Apple	MacBookPro16,1	Laptop	C02FF3QDMD6N			E53E1495-0433-5E8C-
admin's MacBook Pro	admin	Apple	MacBookPro11,3	Notebook	C02NR4W1G3QD			79D0583D-6385-557B-
admin's MacBook Pro	admin	Apple	MacBookPro16,1	Laptop	C02FC4XDMD6T			BF7F4794-0AE2-523A-
admin's MacBook Pro	ramalim	Apple	MacBookPro14,3	Laptop	C02WV263HTDF			BC8026A6-0025-5E31-
administrator's MacBook Pro	aditi	Apple	MacBookPro16,1	Laptop	C02ZR6WQMD6N			A3842644-87DC-5268-

Not reported in 30 days and not returned computers.

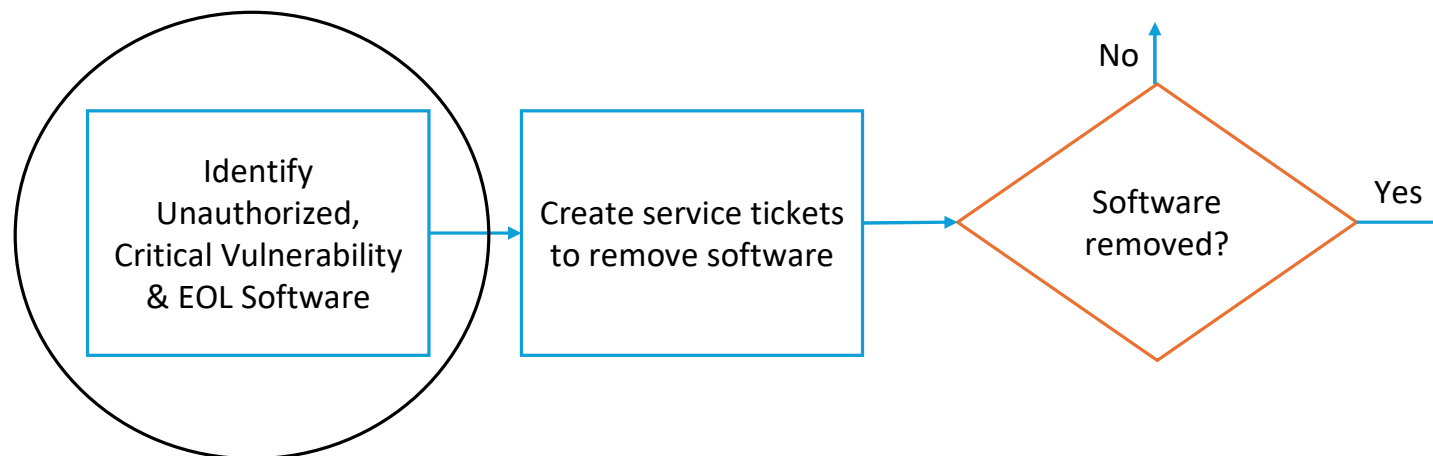
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# Unauthorized, Vulnerable & EOL Software example



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# Unauthorized, Vulnerable & EOL Software example



**Hotfixes Needed**

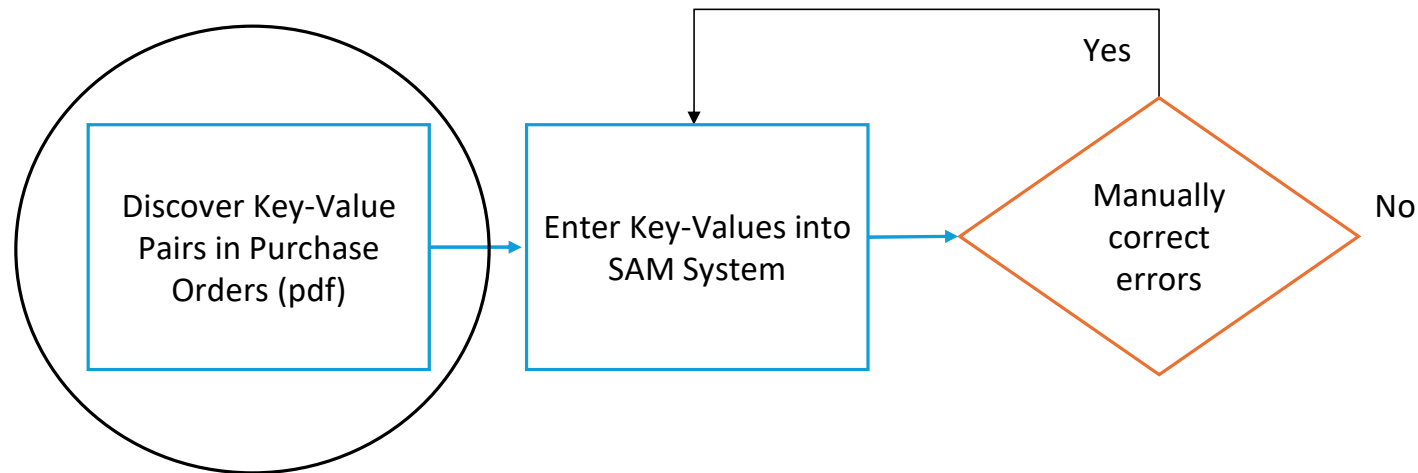
Computer	Name	BulletinId	QNumber	Severity	Vendor	Version	Description
desk_1880	EOL-Microsoft			EOL	Microsoft	Windows 2000	
srv_231	EOL-Microsoft			EOL	Microsoft	Windows 2000	
nb_1516	EOL-Microsoft			EOL	Microsoft	Windows 7 RTM	
desk_959	EOL-Microsoft			EOL	Microsoft	Windows XP	
srv_2146	SP1		SP1	EOL	Oracle	Java 1.5.0.0 32-bit	
srv_637	SP1		SP1	EOL	Oracle	Java 1.5.0.0 32-bit	
desk_391	CpuApr2020	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.20.6 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_962	CpuApr2020	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.20.6 32-bit	Oracle Critical Patch Update Advisory - April 2020
nb_190	CpuApr2020	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.210.7 32-bit	Oracle Critical Patch Update Advisory - April 2020
srv_1844	CpuApr2020	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.210.7 64-bit	Oracle Critical Patch Update Advisory - April 2020
desk_1633	CpuApr2020	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.220.4 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_1741	CpuApr2020	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.240.7 64-bit	Oracle Critical Patch Update Advisory - April 2020
<b>Total</b>							

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

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# Automate entering Purchase Orders



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# Automate entering Purchase Orders

Document Intelligence Studio > Prebuilt

Prebuilt Invoices

API version: 2024-07-31 (Preview) Service resource: PurchaseOrders

Run analysis Query fields Analyze options

Drag & drop file here or  
Browse for files  
or  
Fetch from URL

Purchase Order

11/9/2024  
Purchase Order No. 2024-MS-1001

Asset NO.	Company	Product	Edition	License Type	Rights	Quantity	TOTAL Cost
100	Microsoft	SQL Server	Enterprise	Core	1	1	\$10000.00

12/31/2024  
12/31/2023  
2 Core Pack  
Joe Geek  
SIGNATURE  
DATE

Prebuilt invoice

Key-value pairs

Field	Content	Result	Code
Date	11/9/2024	99.90%	
Purchase Order No.	2024-MS-1001	99.90%	
Asset NO.	100	99.90%	
Company	Microsoft	99.90%	
Product	SQL Server	99.90%	
Edition	Enterprise	99.90%	
License Type	Core	99.80%	
Rights	L	99.60%	
Quantity	1	99.90%	
TOTAL Cost	\$10000.00	99.90%	

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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
  - ▶ Better data security
  - ▶ **Better visibility for SAM & HWAM**
- SAM can initiate workflow automation within your organization
  - ▶ 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, Patent & Trademark Office, Department of State, 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 & Lessons Learned from audience

Sumin Tchen

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[info@belarc.com](mailto:info@belarc.com)

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