

SAM-INSIGHTS FEATURES AND IPR-INSIGHTS SERVICES AT DIFFERENT LEVELS OF SAM MATURITY

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INTRODUCTION

For more than 10 years, IPR-Insights has been providing quality Software Asset Management services to medium and large enterprises both in Hungary and internationally. Our SAM Maturity Model created in 2012 (Fig. 1) is the result of a decade of experience in the field. The purpose of the model is to provide enterprises with a framework for assessing their SAM maturity level and with a guidance to further develop SAM practices.

The goal of this document is to explain how IPR-Insights services and SAM-Insights, developed by IPR-Insights, support enterprise SAM processes at different levels of the model.

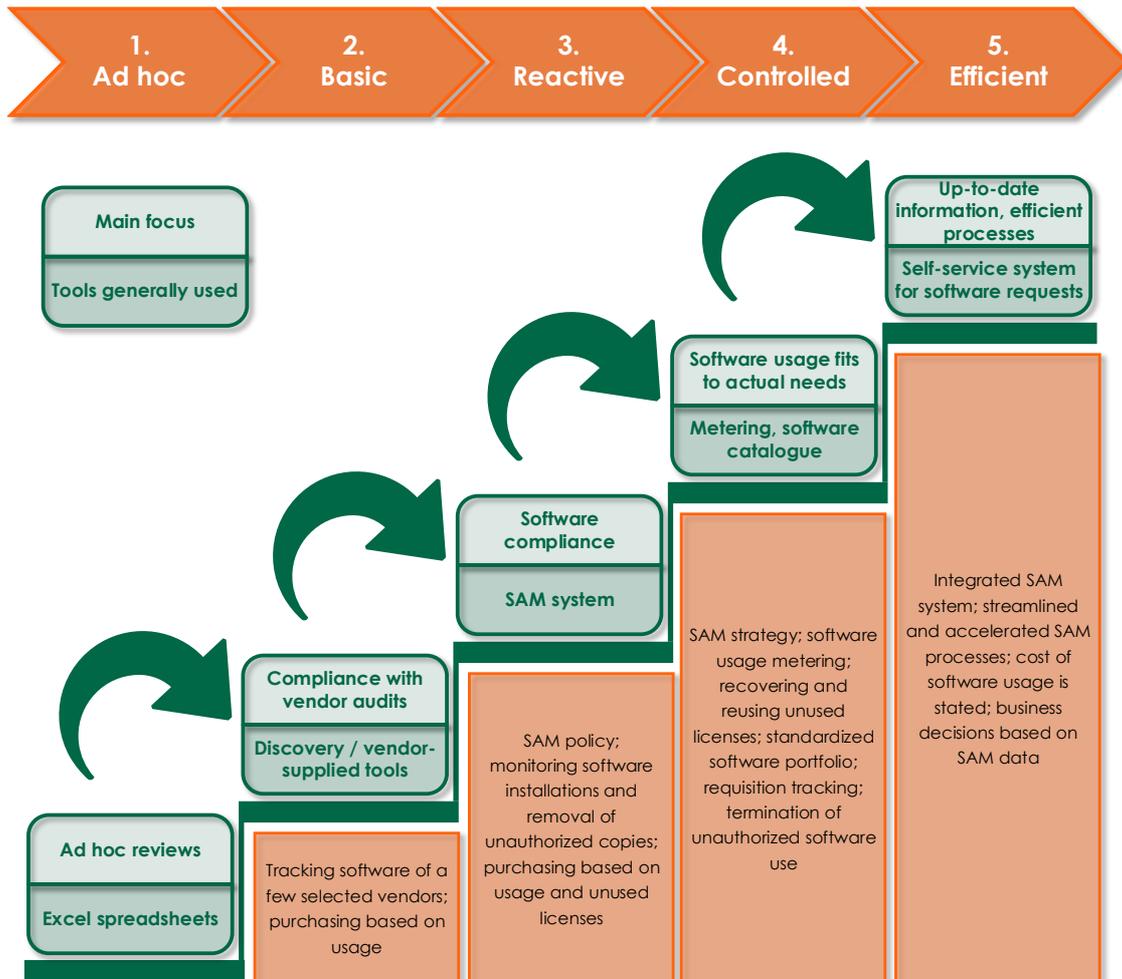


Figure 1: SAM maturity levels

1 AD HOC LEVEL

1.1 Description

At the Ad hoc level of SAM maturity, a company's actions regarding software assets are primarily driven by outside factors like vendor activity. These circumstances might force the company to swiftly review their software usage, or some part of it (like usage of a single vendor's products). As no specialized SAM tool is deployed to support this activity, the emblematic tool of this level is the Excel spreadsheet. Those hastily involved are trying to gather relevant software usage data, usually with poor results. In some cases, there may be a need for keeping the tables up to date, but because of the rapid change of the IT environment this activity soon proves to be unviable and is quickly abandoned. Software purchases are carried out in a decentralized way, without standardized control. There are no policies, roles and responsibilities are unclear.

1.2 Opportunities and Threats

Under the above circumstances the company has no usable information for SAM-related decisions. Unnecessary purchases can be made quite easily, while others fail to happen because the demand remains unknown.

Although a decentralized approach to purchasing, in itself, is not a cause for concern, together with lack of coordination and standardized control it may result in higher prices than what could be achieved by centralized or properly coordinated procurement. In addition, this practice also increases the risk of unnecessary purchases.

Last, but not least, if a software vendor or an authority launches an audit in such an exposed situation, there may be serious consequences. If under licensed usage is found, these may range from unbudgeted and disadvantageous purchases to long-drawn legal proceedings. Looking at vendor relationship from a 'total expense' perspective and hoping that the volume of annual spending will keep vendors at bay is a common misconception. To believe that paying annual support roughly in-line with the value of actual software usage (although not exactly for the same product list or quantities) is going to deter vendors from auditing, or that the audit will somehow be fast-tracked and less thorough, is a serious mistake. Experience shows that software vendors are managing auditing activities centrally - reaching out ever wider, and their local employees have very little room to manoeuvre during an officially started audit processes.

Intellectual property violations are also a very convenient ground for vendors to backtrack on discount levels.

1.3 IPR-Insights Services at the Ad Hoc Level

It is easy to see that a lot of trouble can be saved with a more proactive approach. IPR-Insights offers free consultation on identifying specific risks and introducing the available options to mitigate them.

2 BASIC LEVEL

2.1 Description

Usually the primary driver of enterprises at the Basic level of SAM maturity is that usage or cost reaches a critical level for certain software vendors or some of their products. There is realization – preferably by management, less so by vendor pressure –, that asset management cannot remain at the Ad hoc level. To level up, decision makers need information, so IT are tasked with providing accurate information on how software usage compares with licenses in case of these certain vendors or their key products, usually within a short period of time. Typically, at this level, neither those issuing, nor those carrying out the job are fully aware of its complexity and resource requirement. Therefore, IT (have to) do the job without the necessary resources (tools, expertise etc.), often resulting in some level failure, and in a kind of organizational shock (sometimes even after a successfully executed review). When the task is done and the unit has recovered from the shock, a resolution to carry out regular reviews in the future is born, along with incorporating the results in future purchases.

2.2 Opportunities and Threats

Experience of a number of companies show that the above pattern includes some dangerous misconceptions. Even at an organization with 200-300 computers, reviewing software usage of one or a few selected vendors may tie up key IT resources for months, sometimes without palpable output. Already at this level, the deployment of a specialized tool for quickly and efficiently identifying and measuring software usage is strongly recommended. The prime focus of the tool, however, is key; IT people are most familiar and sometimes biased against tools designed for network or operations management. These, however, do not provide actionable information for Software Asset Management purposes. This lesson, sadly, is often learned the hard way, having invested significant effort into useless output. As ITIL's SAM guide puts it, "it is common to underestimate the amount of time and effort required to turn detailed discovery information into useful information about installed applications".¹ Also, it is essential for even such snapshotting projects that the identification database is current and kept up-to-date throughout.

2.3 SAM-Insights Features at the Basic Level

2.3.1 Data Collection

The purpose of data collection is to gather all necessary data from servers and workstations in an appropriate structure.

SAM-Insights uses its own agent for data collection surveying installed software products and hardware components.

To ensure scanning does not interfere with user activity, the agent may be configured to run seamlessly in the background, but it may be configured to run in interactive mode with GUI, allowing additional information not stored and readable from the computer (e.g. location, asset tag) to be input by the user. Scanning parameters like scheduling, scanning scope, collection mode and target repository may be configured to fit customer's environment and requirements. Our main focus in development was to minimize resource utilization and avoid deterioration of user experience.

The SAMScan agent may be called by a logon script or GPO startup script, as well as remotely via command prompt. The scanner mainly gathers fileprints and registry entries on Windows systems, but it has extensions reading WMI and other customizable software information. As a result, more accurate and reliable information can be collected on programs or host-guest configurations. Scanning output is stored in an encrypted and compressed XML file, usually uploaded on a network share for further processing.

¹ Rudd, Colin: ITIL V3 Guide to Software Asset Management, p. 10.

2.3.2 Up-to-Date Knowledgebase

Data supplied by the agent, e.g. .exe, .com file and header information etc. are transformed, identified and processed by SAM-Insights, translating them into already known applications based on a complex set of identification rules stored in the knowledgebase.

Accuracy and usefulness largely depend on how much data are collected and uploaded to the system and how often the provider identifies the uploaded data; such activities contribute to the maintenance and expansion of the core knowledgebase.

The SAM-Insights knowledgebase has been growing since 2005, based on data collected at several local and international enterprises. Incoming unknown files are identified by IPR-Insights, constantly expanding the database. Updates are being regularly published and uploaded into customer databases under standard maintenance services. If an application we have never come across is installed at one of our customer's site, the identification rules we create for it soon enter all other customer databases, where identification will already be made automatically. Recently our knowledgebase contains over 3 million items and it's growing constantly.

Nevertheless we perform identification of unknown files in every project where SAM-Insights is implemented.

2.3.3 License Management

Anyone who has ever read a licensing agreement or related documents knows that accurately identifying what specific products may be used and how, can be challenging.

The rules are as many as there are vendors, each with its own vocabulary or different, occasionally confusing definitions, with different interpretations of the same words. To make things worse, these rules and definitions are constantly changing, often leaving customers with different sets of rules for even a single vendor.

It is common that software products may be licensed under a number of licensing models, each with slightly different use rights, and some not even defining the product version due to included upgrade rights. Keeping records is made more complex by the variations in the use rights for previous versions (downgrade) under the same license, or, by the rules limiting qualifying base licenses when buying upgrades.

SAM-Insights' functionality incorporates the different aspects of software use rights, as it was specified by our professionals with many years of experience in the field of software licensing and Software Asset Management audits. The application and the knowledgebase provide a licensing guideline and a useful structure for processing licenses efficiently, and enabling automation in reconciling licenses with usage data.

2.4 IPR-Insights Services at the Basic Level

2.4.1 Training

Software Asset Management has, by now, become a complex field. Knowledge of information technology, legal and accounting issues related to SAM, as well as software vendor licensing strategy and policies are indispensable for people working in this field.

IPR-Insights holds customized trainings to support SAM practitioners in:

- Intellectual property rights issues
- Software Asset Management
- Licensing models of software vendors
- Software in accounting

In 2009, IPR-Insights launched an open series, IPR-Insights LicenseAcademy, to provide training for a wider audience.

The two-day training covers Software Asset Management in general, as well as specific licensing topics on widely used software vendors.

Based on feedback from participants, we also launched two in-depth training programs on vendor-specific licensing covering Microsoft and Oracle. These programs feature material tailored for practitioners at an advanced level, providing insight into the finer details of licensing in real-life environments.

2.4.2 Vendor-Specific Reviews

IPR-Insights, as an independent consultant, uses the same methods as software vendors in assessing software usage, then reconcile results with licenses purchased.

During vendor-specific reviews, our SAM experience and independent status ensures a smooth process and fair results. In customer-launched in-house reviews, our audit experience ensures reliable outcome with the added benefit of self-paced reconciliation of actual and intended usage without external pressure. We provide an action plan for managing deviations, mitigating potential risks and finding cost saving options. In case any purchases are made, review results can be used as a touchstone in negotiations and may improve customer-vendor relationships by eliminating uncertainties. We also support our customers throughout negotiations, improving the balance of information and helping achieve the best available conditions.

3 REACTIVE LEVEL

3.1 Description

This level is characterized by a more conscious approach to Software Asset Management with regulatory compliance and mitigation of illegal usage risks in focus. The need for defining SAM-related roles and responsibilities emerges, resulting in policies and regulations. Typically, tasks are delegated to a full-time practitioner reporting to the CIO, responsible for operating SAM processes. To support this work, a SAM application is necessary which features management of continuous scanning, registration of available licenses as well as reconciliation of usage and licenses. At this level, enterprises usually deploy a true Software Asset Management solution. Based on reports provided by the application, IT is working on eliminating illegal installations and, before purchasing new licenses, they check whether unallocated licenses may be available.

3.2 Opportunities and Threats

Long-term operation of a Software Asset Management process is, in our experience, inconceivable without a properly designed system. Daily changes in the user population and IT infrastructure (e.g. user transfers, new servers, new system image rollout) are practically impossible to track manually in spreadsheets even at an organization with just a few hundred computers. In addition, software license items themselves make for busy SAM practitioners (new purchases, updates, support renewals and, finally, disposal). Therefore, when choosing the right SAM solution, special attention must be paid to efficiency and productivity allowed by the system.

It is also important to realize that, similarly to other IT processes, just implementing a system, by itself, is not going to make Software Asset Management work. Qualified employees, processes that are well defined and complied with, as well as quality data are also necessary.

3.3 SAM-Insights Features at the Reactive Level

3.3.1 Infrastructure Change Management

One of the significant challenges enterprises targeting the Reactive level typically face is tracking changes in their hardware infrastructure independent from software but highly relevant for SAM. Such changes, whether they be due to equipment lifecycle or additional purchases in many cases have an impact on software licensing. By implementing a professional SAM tool this follow-up process can be almost completely automated.

The data collection module of SAM-Insights assures that clients are periodically sending new scan results to the central server where they are processed into the SAM-Insights database. These outputs contain the snapshot of hardware configuration and data on installed software. If a new computer joins the network, data collection can be started automatically via Group Policy Objects, logon script or by including the agent in the OS image. To maintain actual inventory data scrapped computers have to be excluded from SAM-Insights database.

The scope of hardware data collected depends on configuration, and can range from basic parameters (like number, type and speed of processors, size of memory, physical disk parameters, IP and MAC address of network cards) to full Windows Management Instrumentation data.

Software data collections come from three sources: fileprints of all executables present on the computer (including name, size, path, and file header information) provide the bulk of output, supplemented by relevant parts of the registry and the list of installed software. On top of that, the agent can be customized to suit custom requirements (such as media files).

Thus, changes in infrastructure and software usage are automatically input into the SAM-Insights database, ensuring up-to-date information for Software Asset Management decisions.

3.3.2 License Inventory

A well-designed SAM process must include unified management of license documentation. It may seem trivial but experience shows that most conflicts between software vendors and their customers derive from the lack of adequate licensing documentation. Even nowadays, there is

a tendency during the sales process, to underestimate the importance of the quality and availability of written licensing documentation, which is all the more valid for purchases of old. If we take into account that software lifecycle, including updates, maintenance, migrations, and audits, may extend well beyond a decade, such a lax attitude has the potential of planting the seeds for serious unforeseen costs down the road.

Although a central repository (both physical and electronic) would significantly ease the work of SAM practitioners, its implementation often faces embedded historical or strategic obstacles at many enterprises. Even so, it is possible to set up the SAM system in a way that access to these several sources and their documents is facilitated.

SAM-Insights offers supporting features which enable management of physical and electronic SAM license inventories, as well as flexible interaction with general-purpose document management systems.

3.3.3 Version Management

Software licenses, just as other assets, have a number of parameters that need to be addressed. One of these is the right to use prior and future versions of the licensed software.

SAM-Insights addresses the issue by product version chains in the knowledgebase and keeping record of license item properties for upgrades, downgrades. The options chosen are then used for optimal license assignment.

3.3.4 Contract Renewals

The software licensing landscape has undergone significant changes in the last two decades. Earlier, the common practice was to procure software licenses for a version current at the time of purchase and return only years later for the next transaction. This era was characterized by upgrade licenses, often as boxed products. Since then, vendors have been focussing on licensing models ensuring a continuous transactional relationship with customers. This era saw upgrade licenses being offered under support and maintenance subscriptions instead of standalone items. The current trend for vendors is to do away with perpetual licensing and switch over to subscription-type licensing, most prominently in cloud offerings, where customers may only use the products as long as they keep paying subscription fees. The number of software vendors and agreements mean that managing these relationships is a demanding task for SAM practitioners.

SAM-Insights offers a one-stop shop for keeping records of contracts and invoices, administration of licenses and use rights, complete with alerts and reports to support SAM practitioners in preparations and processing of license agreement renewals.

3.3.5 Compliance Report

The core of a SAM system is the compliance report, which shows the balance of usage and licenses owned in a standardized format. This may seem a simple exercise but calculating usage figures by taking into account the diverse licensing rules, parameters and metrics is far from straightforward, making this process an important differentiator between SAM systems.

The preparation of the compliance report can be managed in the Asset Management module. Next to the scanning data a wide range of other information have to be aggregated to the Asset Management module for being able to see the big picture, such as license and related invoice data, data collection parameters, user-computer assignments, media repository management, etc.

The administration of software usage licensed not by installations or device counts, but other metrics like user counts and transaction volumes (like Microsoft CAL's, Oracle Named User), is becoming more and more important, which also can be managed in the system.

Virtualized environments also have a great impact on licensing. SAM-Insights takes host-guest relationships into account in automated license requirement calculations.

Results of the automated reconciliation of usage data and licenses can be viewed, filtered and exported in various built-in and custom reports as needed by SAM practitioners.

3.4 IPR-Insights Services at the Reactive Level

3.4.1 Strategy Formation

The implementation of a SAM system and process regulation is best preceded by the formation of a comprehensive, long-term SAM strategy for the enterprise. The strategy sets out the high-level objectives recommended for compliant and cost-efficient software asset management adapted to the local specifics and software-related processes.

SAM strategies designed by IPR-Insights build on ISO 19770-1, ITIL Guide to Software Asset Management and our SAM Maturity Model based on real-life experience. We provide strategies which are feasible, traceable and tailored to our customers' unique environments. Based on customer request we also actively take part in the implementation process.

3.4.2 SAM Process Regulation

Software asset management interfaces with a wide range of other processes. Similar to other areas of management, SAM processes only work well within the appropriate regulation framework, which help reduce the chances of unintentional mistakes, intentional violations and spread responsibility among participants of the process.

Setting up regulations for Software Asset Management goes beyond the basics of creating software usage and software asset management regulations, as the existing framework needs to be adapted to accommodate integration of SAM and, regulation of related specialty topics may also be necessary. IPR-Insights has drafted regulations and assisted in the execution of policies and regulation for numerous enterprises, enabling us to share our experience and provide professional services in reviewing, updating, expanding or drafting new processes and regulations with new customers.

3.4.3 Managed Services

SAM can only succeed if decisions are based on up-to-date and highly accurate software usage and licensing data. Delivery of that data requires special expertise and constant maintenance effort. Some enterprises have professionals who, given the appropriate training and support, may carry the tasks of SAM administration, while others may not have such human capital or build this competency in-house.

As part of our Managed Services, IPR-Insights provides outsourced SAM administration services, including maintenance and management of data collections, license administration and compliance reporting, enabling in-house professionals to focus on tasks, processes and decision-making that build on the information foundation provided by IPR-Insights.

3.4.4 Time-Based Consulting

When operating a SAM framework, a wide range of questions, issues are bound to come up, which cannot be answered or resolved without outside expertise. These questions may range from the legal or accounting aspects of licensing to deeper technical topics like designing virtual environments that are also optimized from a licensing perspective. Since many of these questions are unexpected or cannot be planned, there may be some time pressure when looking for answers to these questions. IPR-Insights offers time-based consulting packages to provide flexible, quick assistance in resolving any SAM-related issues.

4 CONTROLLED LEVEL

4.1 Description

This level is characterized by a level of annual software spending and a software inventory value that management of these assets can no longer be an IT-internal issue: it is elevated to the strategic level. Available products in the company software catalogue are standardized, requests managed and approved centrally, and actual software usage is monitored. Based on that data, unused programs are removed, their licenses re-allocated to fulfil new requests. Computers are tracked for non-standard, unapproved, or illegal software use; such installations are removed, minimizing risks.

4.2 Opportunities and Threats

It is at this level that enterprises start to realize tangible financial benefits from SAM. It needs to be emphasized, though, that these benefits are only possible by keeping up the effort invested at previous levels. Although top-level management support is important at all levels, at this level they truly connect with SAM. Management support is important at each level and, is even more so at this one due to decisions built on SAM, whereupon not only expected, but even previous achievements could be either multiplied or reset.

At this stage process owners' workload is increasing along processes at operative levels, hence appropriate IT background is essential to support them reaching the common goals.

4.3 SAM-Insights Features at the Controlled Level

4.3.1 Master Data Integration

Stepping up from Reactive to Controlled level requires the integration of several external data sources with SAM-Insights such as hardware inventory data, organizational hierarchy, cost center information etc.)

The SAM-Insights AD Connector module enables easy interfacing of one or more Microsoft Active Directories (or other LDAP directories). This connection pulls information into SAM-Insights that provides valuable additional details without manual data input, enabling reporting on users, computers or software by sites, departments or cost centers.

It is also common that some of the necessary data is kept and managed elsewhere (e.g. standard lists or HR systems). Adapting to individual environments, such data sources can also be integrated with SAM-Insights.

4.3.2 Software Catalogue

Standardizing the software pool has significant benefits in terms of operation, security and also for SAM purposes, prompting enterprises to start in this direction sooner or later.

SAM-Insights' Software Catalogue module, based on SAM-Insights software database, allows each version of each software item to be classified according to the individual preferences of enterprises. The classification's goal is to enforce security and operational considerations in software usage and make the software pool more homogeneous.

The Catalogue can be flexibly tailored to suit specific requirements and extended with details that are relevant for operational considerations.

Use of the Software Catalogue can later be expanded for software requesting to control what software can be requested and to allow for differentiated approval processes depending on how a piece of software is classified.

4.3.3 BMail

BMail supports the process of terminating unwanted (unapproved, forbidden, etc.) software usage. In the various escalation phases, BMail sends users and the appropriate superiors notification e-mails about prohibited software installations on the user's company asset(s). The

module works off the SAM-Insights database of collected data. Based on a list from the Software Catalogue or another similar source, the installed software list is filtered for unwanted items; the reports from different dates are cross-checked to show patterns.

The process of notifying users and initiating removal of such installations can be defined flexibly, in accordance with local regulations.

4.3.4 Metering

Software usage metering is primarily used to identifying un- or underused programs, providing an important tool to asset management as these pieces of software can be recovered and re-allocated to assets where they can be better utilized.

Metering is a process logging and reporting how often programs are used. It runs in the background without interfering with user activity. The service is monitoring applications of interest including launch and termination times, storing logs locally until uploaded into SAM-Insights for processing and analysis. By its nature, metering has a relatively long lead time before it can be used for decision making, reliable usage trends can only be established on a sizable sample.

4.4 IPR-Insights Services at the Controlled Level

4.4.1 Accounting Advisory

In order to ensure accounting of software assets is done in compliance with legal requirements, professionals need to be well versed in two fields of expertise. Besides accounting, the appropriate IT expertise is indispensable. Such a combination of expertise is rare enough, plus this knowledge needs to constantly be kept up-to-date, making this task challenging due to frequent changes in both fields.

Accounting itself requires specific knowledge, especially when purchases are made as part of a group, under an international agreement, where licenses need to be allocated to multiple sites in different countries. Changes in corporate structure, divestitures, mergers, closures and legal successions are processes where software assets may be overlooked and companies may drift into non-compliance without their knowledge.

IPR-Insights has the expertise to bring accounting and IT closer, providing assistance in reviewing accounting practices and drafting recommendations based on practices best suited for software assets, and by doing workshops for in-house professionals.

4.4.2 Optimization and Cost Reduction

With the introduction of the SAM system and processes, benefits like full transparency of software installations and licenses, as well as sufficient usage data from metering can be realized within the first year, depending on corporate commitment and the intensity of the project.

The purpose of optimization is to improve the utilization of licenses and find way to decrease the licensing requirement of the IT infrastructure with zero impact on service levels. Optimization builds on the available data and the many pieces of information that come up during the process about the state of operations, goals and preferences of the organization. We provide a range of possible options to lower software costs, both short term and mid-term, to enable decision-makers to factor SAM into shaping enterprise performance.

4.4.3 Used Software Consulting

In 2012, the European Court of Justice has passed a key judgement regarding used software. Although, in European law, the judgment of a specific case has no direct impact on other cases. The verdict, however, provided an interpretation of exhaustion of the distribution right in the European Union's copyright legislation, which is to be followed by all member states, giving momentum to the used software market.

When selling or buying used software, it is, nevertheless, essential to be prudent. The European Court ruling has left a number of issues open, and licenses bought years, or as much as a decade ago may prompt even more questions.

Solving these issues requires expertise in licensing, legal and accounting. Many are good at one or the other, but a comprehensive solution can only come from a single-profile SAM consultancy with a decade of experience. Since IPR-Insights has never sold, and has never had an interest in other vendors' license sales, independent advice is guaranteed, leaving no issues unanswered.

5 EFFICIENT LEVEL

5.1 Description

At this level, corporate IT functions as an in-house utility service, is putting emphasis on the efficiency of processes. In order to increase efficiency, processes are simplified and accelerated by integrating the SAM system with other enterprise systems. Software requesting and procurement are fully integrated. Software usage costs are calculated and SAM data are routinely used in business decisions at various decision-making levels of the organization.

5.2 Opportunities and Threats

By automating processes and integration with other systems, efficiency can be significantly increased. A SAM system can be the single entry point for data that are also used in a number of other systems as well. Hence, by interfacing systems, administrative workload can be significantly reduced.

However, in parallel with the reduction of administrative workload the basic operating process owner's focus has to shift towards data quality assurance. This is important because the data and information transferred from the SAM system to other controlling systems will be as much useful and correct as the original data are.

5.3 SAM-Insights Features at the Efficient Level

5.3.1 INAS

With the optional web-based software request module, users can submit software requests using the local intranet. The request goes through a predefined workflow that might include for example the user's superior, the Security Officer and also the SAM manager. Approved request will be transformed to a license dedication in the SAM-Insights database, so the license will surely be assigned to that user by the license assignment process. The module can be integrated with automated deployment systems like Microsoft SCCM or SpecOps Deploy; this way the whole process can be automated from the arising of the need to the software installation.

5.3.2 Integration Data Services

SAM-Insights can be flexibly integrated with other Enterprise systems like IT asset management, helpdesk or ERP applications. SAM-Insights stores and can provide data useful for other management areas (e.g. purchasing, disposal, release and incident management), that can be used effectively in related processes.

5.4 IPR-Insights Services at the Efficient Level

5.4.1 Preparing to ISO Certification

IPR-Insights performs its services based on international standards and recommendations. ISO 19770-1 and ITIL Guide to Software Asset Management are the foundation of our work, therefore IPR-Insights has the expertise to assist enterprises to adopt and comply with these standards.

In general, the first step of ISO certification is the assessment of current status, followed by preparation for standard adoption, implementation, concluded with the assessment of post-implementation practices and certification. According to the international norms the consultant partner and the certifying partner cannot be the same company as it would cause conflict of interests. IPR-Insights exclusively provides SAM tools and related consultancy services, thus the company does not provide SAM certifications. Therefore the certification of the client's SAM process should be carried out by another independent service provider.

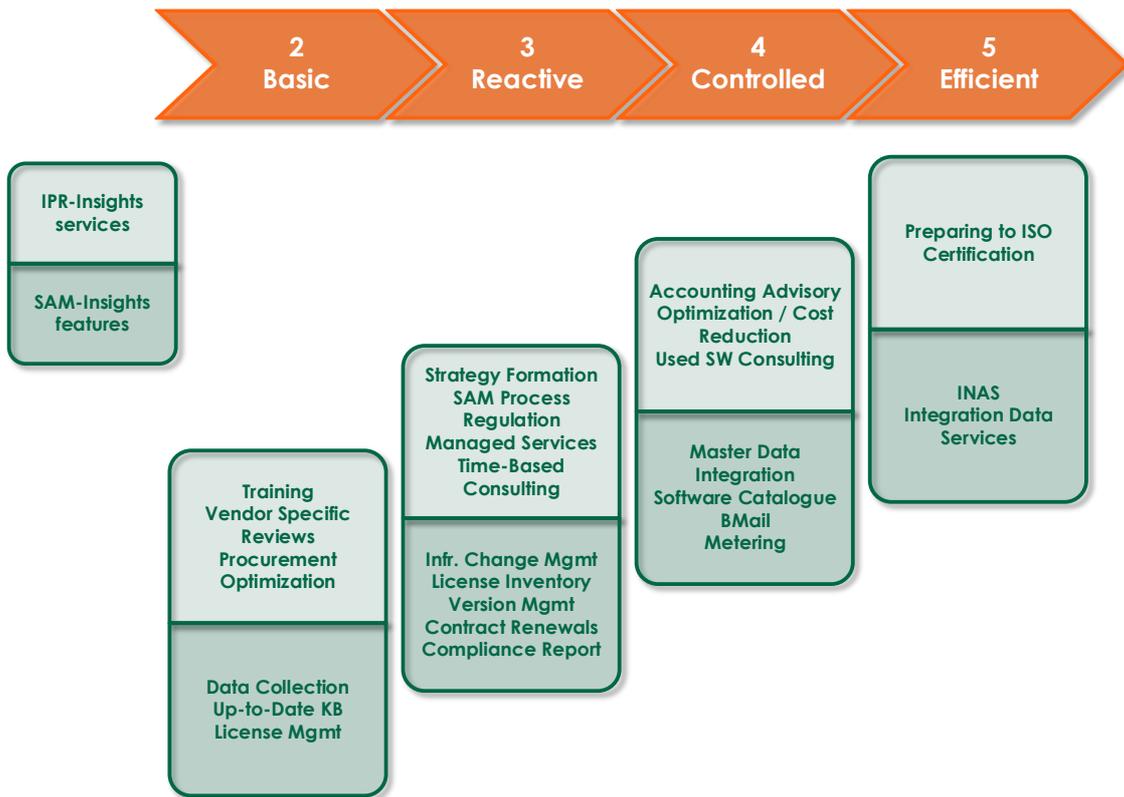


Figure 2: Services of SAM-Insights system and IPR-Insights at SAM maturity levels