



Too Many Licences, So Little Time



by Christina Chamberlain

There are many different directions that we can take when it comes to discussing Software Asset Management (SAM) — this article will focus on how to get started with a SAM project, the challenges of licence reconciliation, and how Novell ZENworks 10 Asset Management can be used to support and automate software licence management. Throughout the last fourteen years, I have had the opportunity to work with many customers, and have been able to draw on their feed-back and experience to put together an ever-evolving list of best practices and recommendations. The following are guidelines on how to tackle the task and reach your goal of effective software licence management.

* The challenges of software licence tracking

Every organisation is at a different point in managing their software assets: from having no formal SAM program; to having a strategy, but lacking the tools to support/enforce it; to a fully developed SAM program. Regardless of where you are, there are several common challenges in managing the wide variety of licence scenarios. Think about the following — do any ring true? Are you somewhere in between? Do you have other areas of concern?

- We don't even know where to begin — it's easier just to true-up based on the vendor's guidelines.

- We have a good inventory, but it's too much work to decipher what we actually

need to track from a licencing perspective. We have a lot of different licence models — it's difficult to track them all.

- We know what we're entitled to, but how do we translate that into an automated system?

ZENworks Asset Management is a tool you can use to support your SAM strategies and policies, by automating licence management, identifying potential for cost-savings, and documenting compliance.

Tip: If you are not familiar with ZENworks 10 Asset Management, I recommend reading the article, 'Worth Your Weight in Gold — Becoming the Asset Your Investors Crave with ZENworks Asset Management', from Novell's Connection Magazine (http://www.novell.com/connectionmagazine/2008/07/pdf_tt2.pdf). This article provides an excellent overview of the ZENworks 10 Asset Management core functionalities, including Software Usage Tracking, Licence Management, and Contract Management.

* Where to begin ...

The two primary data sources for tracking licence compliance are consumption (what's installed) and proof of ownership (what you've bought) — these are the building blocks for defining your licence entitlements. When you add usage statistics, you gain the added value in understanding how these applications are being used.

Consumption

ZENworks Asset Management simplifies the act of gathering consumption data by refining and focusing the detailed application view of your inventory into the licence view. The licence view can reduce the number of applications from a software licence perspective by over 50%. Just think of the common desktop. Along with licenced applications such as e-mail, anti-virus, firewall, office productivity suites, and specialised products, you will find many applications which don't require licencing. Applications such as internet browsers, messenger clients, document viewers, evaluation and run-time versions of applications, even suite components, the list is endless.

Tip: The suite is included in the licence view, however, as the individual components of the suite do not require licencing, they are excluded. Through compliance reporting you are able to drill into the suite to see the installation and usage data for the individual suite components.

With ZENworks Asset Management, you have taken the first critical step to identify applications to track for licence compliance.

Proof-of-ownership

Gathering proof-of-ownership data can be complicated. If you're lucky, you already have some kind of system in place for centrally tracking and organising this data. Your system might be a purchasing system, a home-grown database or spreadsheet, or maybe a series of purchase reports from

the software vendors and/or resellers. It may even be stored as hard copies kept in binders or file cabinets, or scanned into a document management system. Or, you might find yourself in a situation where this data is widely distributed through-out the organisation. This is often the case when purchasing is not centralised and for organisations which have grown through mergers and acquisitions. For many it's a little bit of all of the above. Regardless of how the proof-of-ownership data is stored you can add it to ZENworks Asset Management. Once you have your consumption and proof of ownership, you can begin the steps of reconciling this data to document your compliance status. This starts with understanding your licence entitlements.

Tip: Do not despair! Do not feel that you need to have all proof of ownership data for all applications before you can start tracking compliance. Pick a particular manufacturer, or a handful of products to start with. Do you have a maintenance renewal or true-up in the near future? Focus on these products initially.

Usage tracking

ZENworks Asset Management usage tracking gives you the knowledge to identify not only where you are over-spending on licencing, but to also make smart decisions on application standardisation. Every organisation has different requirements for the length of time needed to identify under-utilised applications. Therefore it is important to determine the duration which brings value to your analysis, keeping in mind it may differ from product to product.

* What does this licence agreement mean?

Probably the most challenging aspect to managing software compliance is understanding what you're entitled to. We have heard from many customers that purchase

records and other sources of proof of ownership are not always clear about what is covered by the purchase. Is it for new licences, an upgrade, maintenance, licence plus maintenance, media? What are the upgrade and downgrade rights? Is it a term or perpetual licence?

Luckily, many resellers and vendors provide a detailed description of the product purchased, along with the Manufacturer SKU and a `product type` descriptor. This information is invaluable for identifying the way you need to track an application's entitlement regardless of licence model.

So the first question to ask for each application is, what type of licence model/s do we need to track?

Licence Models and Entitlement

Many applications have a simple, straightforward licence model, where one licence is required for each machine that application is installed to. If only all were that way. Instead it is necessary to track applications under a variety of models, and in some cases even multiple models per application. With ZENworks Asset Management, each licence model is tracked as an entitlement, which are in turn linked with a Licenced product, see Figure1, which allows for tracking multiple licence scenarios.



Figure 1: ZENworks Asset Management Licenced Product

Licence models can be categorised as being based on inventory data or on external data sources:

Inventory based:

- Per-installation — A licence is required for each machine the application is installed to.
- OEM/Machine based — The licence is tied to a specific machine and cannot be transferred.

External source:

- Qualified Desktop, CPU, User, Named User, Server, Client Access Licence (CAL), Site, and Enterprise. - The licence is tied to non-inventory data.
- Additional external source models can be defined.

When you are managing software licences, it also helps to identify the level of complexity of your Licencing:

Simple

- Licencing covers a specific version under the per-installation model
- Licencing covers multiple versions under the per-installation model (downgrade/upgrade rights via maintenance or software assurance)

Medium

- Licencing includes upgrade purchases
- Licencing includes multiple versions with different downgrade rights
- Licencing is for suites that are not easily identifiable

Complex

- Licencing includes multiple licence models per application

Tip: Each licence entitlement can be further defined by specifying whether the licence is a term or perpetual licence, whether it is a version upgrade, and by attaching documents, and associating with a contract.

The next step is to tie this information to-

gether in a way that reflects your overall licence status. We'll talk about how this can be achieved using ZENworks Asset Management.

* I've got my data - now what?

You have your consumption data from your ZENworks Asset Management inventory and you have gathered your proof-of-ownership data. You have decided which applications to initially focus on and you understand the different licence entitlements which apply to those applications. In this section we'll outline the basic steps for using ZENworks Asset Management to manage, monitor and automate your software licence compliance.

Import Purchase Data

The first step is to import purchase data for proof-of-ownership.

Tip: Remember the value of importing a selection of records based on the products you have chosen to focus on. Don't try and import all purchasing data at once, With ZENworks Asset Management, you have several options for importing the data:

- For CompuCom, Insight, KMD, SHI and Softchoice — use the ZENworks Asset Management reseller connectors (reports made available by these resellers).
- For electronic data from other sources — use the Standard Import File Format (essentially you're replacing the existing headers with those known to ZENworks Asset Management).
- For hard copies — enter the data into a spreadsheet with the Standard Import File Format.

When you import data, a catalog product is created for unique purchase record line items, this is what you will use to reconcile the purchasing data to a licence entitlement.

Tip: You do not need to 'clean-up' purchase record reports prior to importing into ZENworks Asset Management. You can identify and exclude data by searching on the product type and the product description fields. For example, search on the values Media, CD, DVD and Doc. The advantage? For future imports these products will be automatically excluded, although the data is still in the system and can be reported on, and, if necessary, can be re-included.

Create entitlements & licenced products

The second step is to define licenced products. Each licenced product definition will have at least one entitlement reflecting the licence model for that application. You can quickly create multiple licence definitions at once using the auto-reconcile feature, see Figure 2 — this automatically creates one licenced product with an entitlement for each application you select. When you use auto-reconcile, you can only select one licence model at a time, so you will want to repeat the process for each licence model, i.e., run through the auto-reconcile per-installation models, then for OEM models, then for CPU models, etc.

same. Enter the licence model as the entitlement description — it can be modified later if necessary.

Add proof-of-ownership per entitlement

The last step is to add proof-of-ownership to each entitlement. You have two options for adding proof-of-ownership: reconcile one or more catalog products to the entitlement or enter purchase summary records. Purchase summary records allow you to manually enter licence quantities.

Tip: If you are already tracking Licencing in a database or spreadsheet, use this data as a starting point for automating your compliance management in ZENworks Asset Management. Use the purchase summary record feature to enter your current entitlement, with a reference to the source data for auditing purposes. This allows you to set a base-line upon which you will build as you import purchase records moving forward.

Refine Entitlements & Licenced Products

The previous three steps reflect how you would create licenced product definitions under a simple licence model. For the more

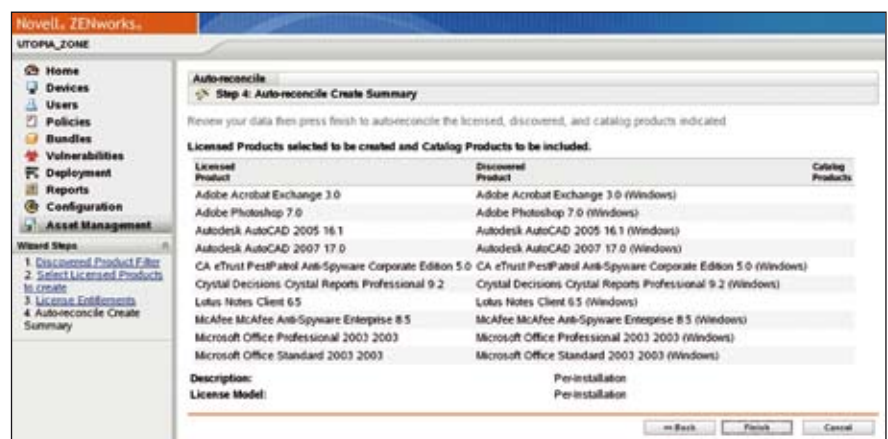


Figure 2: ZENworks Asset Management Auto-reconcile

Tip: If you are creating multiple product definitions using auto-reconcile, the description for all the entitlements will be the

complex scenarios, you can build on these definitions. Following are a few suggestions for making this easier:

- Licence with upgrade/downgrade rights: Use merge to bring the different versions as individual entitlements under one licenced product.

- Upgrades: Create one entitlement for each version (you can use merge to do this), modify the entitlement for the upgrade version and specify the entitlement to upgrade from.

- For machine/OEM licence models, associate the appropriate machines. Use the search function to quickly identify machines with the product installed.

- For downgrade rights you can associate multiple application versions to an entitlement. The same version can also be assigned to several entitlements under a Licenced product. For example, you may have Office 2000, 2003 and 2007, where 2003 and 2007 have downgrade rights. You would create three entitlements for the Office licenced product: the first for 2000 only, the second for 2003 and 2000, and the third for 2007, 2003 and 2000.

Add entitlements for other licence models, i.e., CAL, CPU, User, etc.

- Create software contracts to reflect maintenance, support, software assurance or other vendor agreements which cover one or more licences. You can then associate the contract to the individual licences, giving you a consolidated view of what is covered by the contract.

Reporting

Once you have created your licenced products, the ZENworks Asset Management Compliance Report provides a centralised view of your compliance status for each product (see Figure 3). Filtering options allow you to focus on specific manufacturers or products. You can also group the results by site, department or cost centre.

The report is interactive and allows you to drill down to see the installation, usage and purchase details for each product.

Product	Manufacturer	Version	Compliance	Usage	Purchase	Details
Microsoft Office 2007	Microsoft	14.0.4743.1017	Compliant	100%	10/10/2007	View Details
Microsoft Office 2003	Microsoft	11.0.6002.5512	Compliant	100%	10/10/2007	View Details
Microsoft Office 2000	Microsoft	10.0.6925.5314	Compliant	100%	10/10/2007	View Details
Microsoft Office 2007	Microsoft	14.0.4743.1017	Non-Compliant	0%	10/10/2007	View Details
Microsoft Office 2003	Microsoft	11.0.6002.5512	Non-Compliant	0%	10/10/2007	View Details
Microsoft Office 2000	Microsoft	10.0.6925.5314	Non-Compliant	0%	10/10/2007	View Details

Figure 3: ZENworks Asset Management Software Compliance Report

You can also create custom software compliance reports through the ZENworks Asset Management console, or create Web Intelligence documents via the ZENworks Reporting Server powered by BusinessObjects™ Enterprise XI.

With your licence definitions in place and through the many reporting options, you are now in a position to make more informed decisions about your software licencing.

* Reaping the rewards

Don't under-estimate the value of working in stages towards tracking all your products. In prioritising the licences that you define, you are able to bring immediate value to your organisation by identifying:

- Over-licenced, yet under-utilised products — Reduce the number of licences and save money.
- Under-licenced, yet under-utilised products — Re-allocate licences, save money and avoid non-compliance fees and fines.

As you continue building your software licence definitions, you will also learn a lot about the diversity of applications in your environment. You will uncover other ways to reduce costs associated with software — not just by saving on Licencing, but also by reducing the number of applications that are supported by your IT staff. Be on the look-out for the following:

- Products that are no longer in use — Have you been paying maintenance and supporting applications that are no longer required?
- Under-utilised, high cost products — Can you replace a licenced application with a free viewer? Are all components of a suite being used? Can you implement open-standard products for some of your users?
- Multiple products and versions that serve the same function — Can you standardise on one or two products and versions, rather than supporting a large variety?

Software compliance management can be a daunting task. But by taking the right steps and using ZENworks 10 Asset Management to support the process, you will be well on your way to reaching your Software Asset Management goals.

ZENworks 10 Asset Management is available as a stand-alone product or as an add-on to ZENworks 10 Configuration Management. Find out more! Visit www.novell.com/zenworks/assetmanagement to download an evaluation, view a demo, use the ROI calculator and compare the new ZENworks 10 Asset Management with previous versions.

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