SAM-Insights

User-friendly applications
for efficient and compliant
Software Asset Management

Software Asset Management (SAM) is part of **enterprise strategy.** It includes accurate and up-to-date records on actual software usage, license agreements and related invoices. It also embodies the corporate regulation of software standards and life cycle processes (such as usage, procurement, inventory etc.). In order to operate the company risk-free of from legal aspect, SAM principles **have to be consistent with relevant regulatory and legal provisions.** At the same time, they have to be **cost-efficient**, contributing to the company's competitiveness.

Due to the rapid development of information technology and increasing complexity of IT systems and software licensing, appropriate recording of hardware and software assets without a specific **software asset management application** is almost impossible.

The SAM-Insights system

The **features** of SAM-Insights software asset management system **were specified by our professionals** with many years of experience in the field of software licensing and software asset management audits. Beyond collection of software and hardware data from workstations and servers, **this application provides unique means** to address the complexity of licensing and to help software record-keeping **which indeed makes the daily processes of SAM in enterprise environments efficient.**

Based on our experience, successful software inventory management mostly depends on completeness of data collection, adequacy of application identification and accuracy of handling license features. Therefore, these three fields have been identified as key factors when developing our system.

1. Data collection

Data collection concerns the whole IT infrastructure of the company, therefore keeping resource use at minimal level is essential. The agent of SAM-Insights **(ClientPack SAMScan),** developed bearing in mind the main purpose to avoid performance reduction, so that it **runs seamlessly** in the background.

Operating features of the agent (e.g. frequency of scanning, timing, scope of data collection, and way of uploading to the server) **can be set up flexibly**. Beyond collecting data for software identification, the system is designed to acquire basic hardware information and, on demand, data from the user interactively that otherwise could not be collected electronically (e.g. location, asset tracking number).

2. Application identification

Since the compliance of the whole SAM process depends on the reliability of software usage data, the method of compiling the list of software usage is very important. Unfortunately, assessment of "Add/Remove" list of Windows and header information of executable files is difficult, and results in an outcome with lots of errors. Hence, **SAM-Insights collects only basic information from the client** (registry- and header information of executable files and other relevant data from licensing point of view), **and builds the software installation list on the server, based on a complex set of identification rules stored in a knowledge base.**

Considering that most of SAM-Insights users are from the enterprise market, its software identification database **can identify the most common applications existing in the enterprise IT environment**. In addition, implementation of the system covers **the identification of applications at the company that are new to the system, and the expansion of the knowledge base with new identification rules.** It is critical to keep the knowledge base up-to-date at all times, as this is the only way to keep the software asset registry accurate. That is why **SAM-Insights support services include regular updates of the knowledge base**, and if it is needed **regular application identification** of newly implemented software at the company can be requested.

3. License Management

The next key step is license management. Licensing database contains all information about licenses and invoices of the company. **SAM-Insights requires neither expertise in this field, nor manual work from the user to assign licenses to installations.** Instead, uniquely it handles elementary features of licenses (such as downgrade and upgrade rights, secondary computer use rights, maintenance agreements, subscriptions, not installation based – e.g. processor-based – licensing), and **optimizes and automatically assigns software licenses to software usage** based on them.

The knowledge base also contains information about license programs of the major vendors **to help simple, accurate and fast data entry**. SAM-Insights can furthermore dedicate licenses to computers in order to record approved and compliant usage within the company, thus these licenses cannot be used accidentally by unauthorized users.

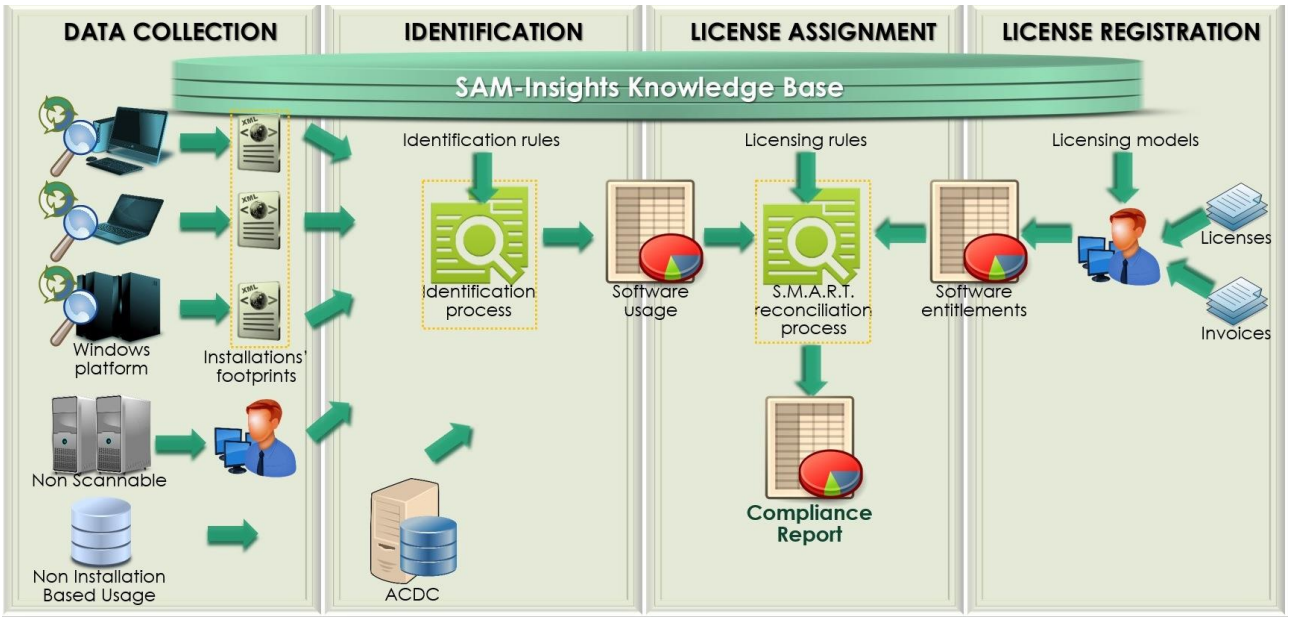

Figure 1: SAM-Insights data flow

SAM-Insights Core System

SAM-Insights is a **modular system** and its modules support various segments of software asset management. (Some modules provide functionalities covered by the SAM-Insights license, but implemented only upon request and for additional fee.)

Management Client

The Management Client is the workspace for the SAM manager. With the help of this module, you can **manage and report relevant data from licensing perspective** (e.g. licenses and invoices, not installation based usage, dedication).

ClientPack

The Client Pack warrants proper operation of **installation data collection** outside managed environments, as well. It extends the functionality of **SAMScan and Metering agents**, hence data uploading can be controlled more flexibly, plus configuring and refreshing clients can be managed remotely.

Data Collection Server(s)

Data Collection Server **temporarily stores data collections** provided by the ClientPacks. Optionally, more than one servers can be installed if the network infrastructure requires.

Application Server

The batch processes of the Application Server load installation data stored on Data Collection Server(s) into the database. They **run the automated identification and license assignment processes** so that reports will be up-to-date.

Database, Knowledge Base

The SAM-Insights Database contains company related data and the Knowledge Base. It stores all information about licenses and invoices of the company. The software installations and hardware properties of the company's computers are also located in this database. The Knowledge Base contains all of the rules that transform executable file information into installation list, and also information about license programs of the most common vendors to help simple, accurate and fast data entry.

SAM-Insights Data Explorer (SIDE)

The SIDE module extends the built-in reporting capabilities of SAM-Insights. The toolkit discovers deeper relations of the SAM-Insights database, and displays data on a user-friendly and customizable web based reporting user interface with the help of lists and graphs.

Interfaces, Connectors

Users of the Core System are entitled to use the existing interfaces of SAM-Insights, like the AD Connector. With this tool, it is easy and fast to transfer relevant data from Microsoft Active Directory to the SAM-Insights database (e.g. department, cost center, disposal status), which provides new perspectives to analyze data and possibility to automate the disposal process.

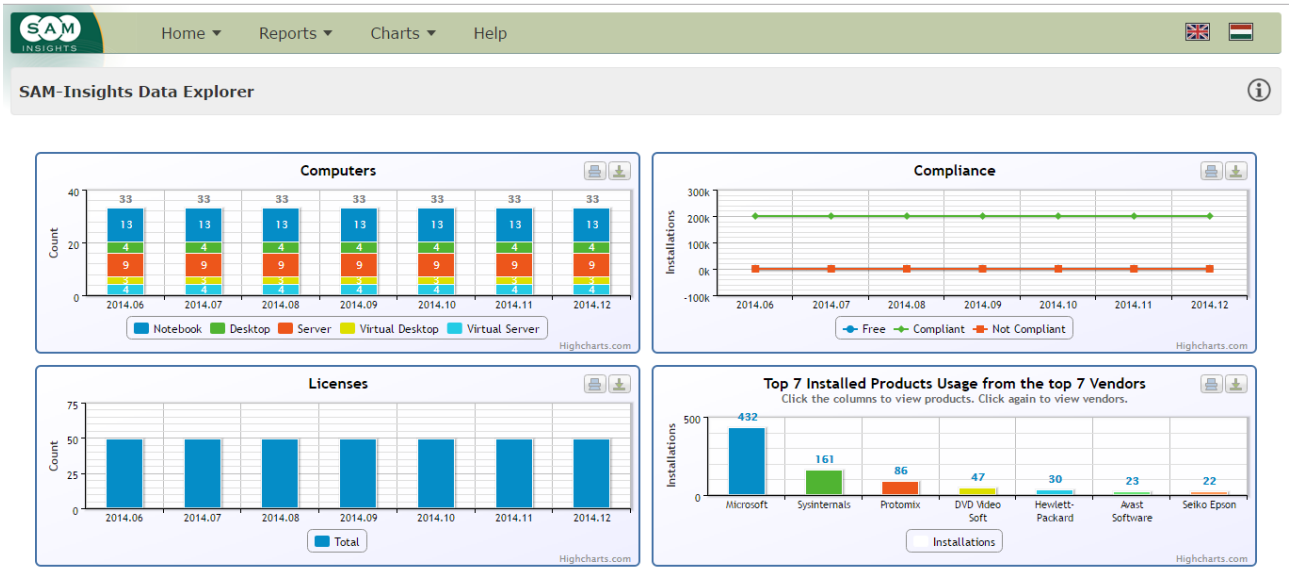

Figure 2: SAM-Insights Data Explorer, graphs

SAM-Insights Additional Modules

There are also optional modules available for additional charge. These modules provide extra functionality for the SAM-Insights system.

Software Catalog (SWCat)

The Software Catalog module gives the means to assign corporate level classification to certain software versions. This classification may include categorization (forbidden and approved software version) or other specifications (e.g. operational ones). The goal of categorization is implementing operational and security aspects in software usage, and homogenizing the software park by unified version usage. Prior to launching the SWCat, classification categories should be defined, and descriptions of categorization principles attached.

Breach Mail (BMail)

BMail application checks prohibited software usage, and sends notifications via email messages. SAM-Insights report generator provides data source, and the layout of the documents is editable by a fully equipped third party editor based on html language and css descriptors. Levels of notification can be adjusted to three levels (user, manager1, manager2) of software usage breach.

Metering Mail (MMail)

The MMail module can send notifications regarding the frequency of software usage measured on certain clients, and installations identified as not in use. Thus, removal of unnecessary applications from reported clients can be regularly considered.

Advanced Central Data Collector (ACDC)

By providing appropriate permissions and data sources, ACDC is able to read and load into SAM-Insights system the usage data of software products that are not measurable by scanning the computers. In these cases, software is not licensed based on the number of installations, but other metrics (e.g. number of users, number of transactions). Another case might be the absence of installed components (e.g. Core CAL).

I Need Another Software (INAS)

With the optional web-based software request module, users can raise software requests using the local intranet. The request goes through a defined workflow, then upon approval even the installation can be arranged automatically applying a suitable deployment tool. Approved request is transformed to a license dedication in the SAM-Insights database.

SAM-Insights for Oracle (ORCA)

In case of Oracle Database products, license need is not solely defined by installed functions, but internal configurations, and hardware environment are also calculated. Moreover, they are typically used in Linux or UNIX environment.

The ORCA tool was configured and developed based on these specialties of database products, and is offered from 30-50 Oracle DB servers as individual solution or integrated with SAM-Insights Core System.

Figure 3: SAM-Insights Core System & Optional Modules