



# Decision Support System *Software Asset Management (SAM)*

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Implementation Guide

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# Laying the Foundation

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A well-implemented Software Asset Management (SAM) initiative can create significant cost savings across your enterprise - on software as well as process and infrastructure. It puts you in a stronger negotiating position with software vendors and, most importantly, provides you with powerful peace of mind when it comes to the legalities of license compliance. With a healthy SAM implementation within your environment, you'll always know what software you have, where it is, and how it's being used.

This kind of information is critical from an operational as well as strategic standpoint. A healthy SAM program will enable your organization to directly manifest value from your IT investments. Ultimately, your three objectives to implementing a SAM process across your enterprise is to reduce cost, reduce risk and bring every IT asset into legal compliance.

SAM benefits can include:

- Reduction in software Total Cost of Ownership
- Technology migrations supported with real information
- Alignment of software assets with legal licenses
- Removal of software liabilities
- Improved budgeting and planning processes
- Improved user productivity
- Reduced support calls
- Improved desktop and network security
- Reduced overall cost of asset management

This document is intended for personnel who grasp both the technical aspects of SAM software as well as the business implications of using best practices in its implementation. This individual will steer the implementation process for all stakeholders with responsibility for all licensed software assets installed on your enterprise's end points and servers.

## Overview

With BigFix DSS SAM software, you have selected a powerful application for managing all of the software applications installed across your enterprise. But this tool is only beneficial when implementation follows the necessary steps to ensure it operates at full potential, and adequate time is allocated for setup procedures. This Guide will provide a straightforward approach to using best practices building blocks to configure BigFix DSS SAM to meet your financial and contractual compliance needs. Most of your setup process will involve your Software Catalog. Why all the preparation?

Imagine you've just purchased a new iPod, and you're preparing your new electronic media library. First, you'll locate the media you want to load onto the device. Then, as the device is pre-formatted with media categories (music, movies, photos, podcasts), you will organize and categorize that media to decide which of each "type" to load onto the device. What about storage capacity? How much of your library can you fit onto the device? Once you determine these initial questions, you're ready to start uploading!

Setting aside adequate time for these early considerations will ultimately give you a comprehensive library of music and media available at your fingertips. This process is similar to how you will begin thinking about your Software Catalog. To review specific details about the DSS SAM Software Catalog, review the Software Catalog *Editor's Guide*.

Ascertaining these types of questions represents exactly the level of preparation you need to optimize SAM's many long term benefits. A successful, well-planned implementation will result in cost savings, streamlined IT productivity, and continuous compliance with software licensing regulations – all in all a powerful tool that can reduce risk and save money for your enterprise.

## Typical SAM Implementation Structure

The figure below shows how a typical SAM implementation plan might be structured using a company's available resources.

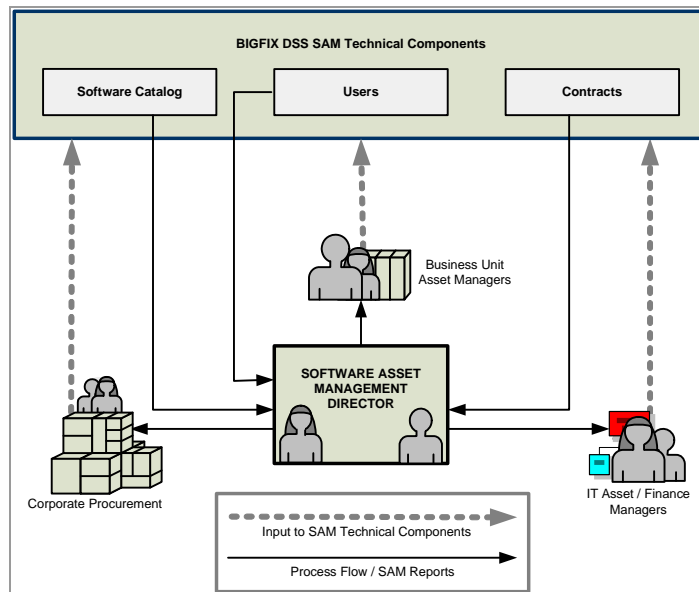


Figure 1. Typical SAM Implementation Workflow

In a typical implementation, designated stakeholders will have direct input to the SAM database and also be recipients of reports generated by DSS SAM. The table below outlines the primary components of DSS SAM and the various user roles.

### SAM Components and Roles

| SAM Components          | Description   |
|-------------------------|---|
| <b>BigFix DSS SAM</b>   | This is your installed SAM application containing the primary elements you will need to customize: the Software Catalog, Users, Contracts, and Saved Reports. Once the implementation is in place, SAM will generate reports based on your specific requirements. |
| <b>Software Catalog</b> | BigFix DSS SAM Software Catalog contains a vast database of software  |

|   |  |
|---|--|
|   | publishers, titles and versions when installed that will be recognized from the agents running on your endpoints. There may be other software applications installed on various endpoints or servers on your network that are not included with the off-the-shelf DSS SAM software. You need to update your catalog for completeness, and then verify it for accuracy. After that, you will update the catalog any time a new software title not already in the default list of software is installed.   |
| <b>Users</b>                              | BigFix DSS SAM defines specific roles and permissions for different types of SAM users. Regardless of a user's role, as users leave or move within the company, DSS SAM allows you to create many users and grant varying levels of access to support your enterprise's asset management needs. Typically, someone in the IT organization will be responsible for the initial setup and maintenance of this function to respond to turnover within the company.  |
| <b>Contracts</b>                          | Nearly all enterprise-level software applications requiring multiple licenses have contractual information that specifies the number of licenses (seats), purchase and expiration dates, and other pertinent data. You will enter, monitor, and maintain this information on a continuous basis.   |
| <b>Company Roles</b>                      | <b>Description</b>   |
| <b>Software Asset Management Director</b> | The SAM Director takes ownership of the implementation plan and works to ensure that the primary components of the application are current, accurate and primed for easy maintenance, and gets stakeholders involved to ensure a smooth transition to the new SAM system. The SAM Director will also keep senior management apprised of the progress and status of the SAM implementation plan.  |
| <b>Corporate Procurement</b>              | In many companies, the Corporate Procurement department is responsible for purchasing new software titles or upgrades and tracking the associated software licenses and contracts. This function will also be responsible for updating and maintaining the SAM Contract database to ensure accurate and current reporting of assets.   |
| <b>IT Asset Managers</b>                  | In some situations, IT personnel will install and track new or upgraded software titles and maintain the SAM Contracts database. They will also understand the way the DSS SAM application is deployed across the company's technology resources. IT Asset Managers will typically work closely with the SAM Director to ensure that the flow of information to and from the SAM application is efficient and reliable.  |
| <b>Finance Managers</b>                   | Finance Managers play a pivotal role in utilizing SAM for its intended purpose – fulfilling compliance obligations and managing the costs of software installed on your network. Finance Managers are the primary customer for SAM reports and will use this information to document compliance for both internal and external auditors. Through coordinating with the SAM Director, they will use these reports to send accurate data to management regarding the company's use of software, as well as recommendations for cost savings. Financial Managers will also play a vital role in helping assign the priorities and criteria needed for meaningful SAM reporting. |
| <b>Business Unit Asset Managers</b>       | Business Unit Asset Managers oversee the software asset tracking for their own business units and are responsible for the day-to-day software asset management (criteria, reporting) within their organization. In many scenarios it may be best for a company to delegate local management in remote business units to take ownership of their business unit's software assets. The Business Unit Asset Manager works closely with the SAM Director to ensure that their business unit's needs do not conflict with SAM requirements, and facilitate smooth implementation to fulfill compliance obligations and cost savings.  |

In general, the SAM Director is the key to pulling all of the elements together towards a successful SAM implementation. Proper preparation is vital to realizing the most expeditious ROI for your software assets.

Pre-implementation is an excellent time to begin thinking about Computer Groups, Computer Properties, and Saved Reports. These are all integral to the initial setup of SAM in your organization to create an effective deployment with useful views and reports. The table below outlines the primary uses of these features:

| SAM Features               | Description   |
|----------------------------|---|
| <b>Computer Groups</b>     | This feature is useful for creating units of analysis based on computer properties that you can use to slice and dice your reports and to which you may assign contracts. It gives you the ability to hone your report views to a specific set of computers. For example, all servers, all Windows computers in North America, all computers below a certain patch level, etc. Computer groups can also be hierarchal – this means that you can have groups and subgroups. For example, all servers>in North America. |
| <b>Computer Properties</b> | This feature gives you the ability to add attributes about your computers, which can be used for filtering, sorting, and grouping. For example, quantity of RAM, active directory group, hardware vendor, etc.  |
| <b>Saved Reports</b>       | Use this feature to create and share report settings for commonly-used views of the data. This gives you 1-click access to reports.   |

## Assess Needs and Requirements

Why does your organization need a SAM program? Part of your assessment process will involve identifying the drivers to making this change. Are you being pressured by management to validate IT costs? Have you been notified of an upcoming external audit on your software licenses? The costs of managing assets and the risks of having noncompliant licenses are the two primary catalysts for implementing a SAM program. But more than that, you need to determine what tools a SAM product will give you that you don't already have. Also, what short and long term benefits do you envision will result from implementing SAM in your environment? And most importantly, how much money is your organization likely to commit to realizing these goals?

With a SAM process in place, you will discover what IT assets you have, how they're being used, where they're located, and if they're legally licensed. And once you have this information in place, you'll have an easier time selling the concept of ongoing compliance to the stakeholders involved.

- **Assessing the Scope of Your SAM Implementation Plan**

Your company is unique and has its own built-in methodologies that distinguish it from other companies. At the same time, any implementation process requires planning and forethought to ensure its success. Your compliance with regulatory agencies and maintaining strong vendor relationships are critical. Ultimately, your scope assessment must consider exactly what you need from a SAM process and how your enterprise is expected to change as a result. These changes include legal compliance to software license contracts, as well as significant cost savings in asset management.

## ▪ Identifying Compliance Gaps and Deficiencies

If your organization has already gone through a compliance audit, you were likely given a list of gaps and deficiencies that you will address during the remediation phase. If not, consider conducting an in-depth internal audit of your technology resources to anticipate and eliminate possible compliance issues before they arise. Either way, you need solid data on your regulatory standing and a plan for how to address any gaps. SAM will play an important role in helping you meet your compliance expectations and obligations.

## ▪ Testing Your Implementation Before Going Live

An extremely effective method for discovering potential problems with your SAM implementation is to test it with real data in a test bed network *before* turning it on in your company's network. Such testing can quickly identify missed steps, weaknesses or pitfalls that may have occurred during the preparation or customization stages. Finding them in a non-volatile environment is safer and can save you time and money in the long run.

## Management Support and Approval

Before implementing SAM, you will need not only management buy-in but a financial commitment to sponsor the entire scope of your SAM implementation. How do you make a compelling case to management about the benefits of SAM technology in your enterprise? The overall question management will ask is if they can afford this change. Ultimately, in light of what we now know about software asset legal compliance standards, they can't afford *not* to implement SAM.

Start by ascertaining what management will specifically want to know:

- What are the upfront costs?
- How much training will be required for IT personnel?
- How much IT productivity will be lost from implementation?
- What are the ongoing costs for maintaining SAM long term?
- Who are the organizational stakeholders and what will you require from them?

## Establishing SAM-based ROI

Ultimately, management will be interested in realistic ROI figures. You can create these by establishing metrics early on in the process, mapping the cost of your current deployment with your SAM post-implementation costs. This optimization of SAM-based ROI can be calculated in several specific areas, using the following formulas:

## Calculating Sam-Based ROI

### Reduced System Support Costs

The number of computers x the average number of annual support tickets per computer x the cost per ticket x % reduction in average call length

**Example:**

1,000 computers x 4 support tickets per computer per year x \$40 per ticket x a 25% reduction in average call length = **Annual Savings of \$40,000**

### Reduce Unused Software Licenses

The number of unused or underutilized software installs x licensing costs

**Example:**

1000 copies of unused but installed desktop publishing product x \$1200 per license = **a potential savings of \$120,000.**

### Minimized Internal IT Audit Expenses

Number of computers x the time required to audit each computer x the hourly cost of an IT staff member x the number of audits performed each year

**Example:**

A company with 1,000 computers x 15 minutes to audit each computer x \$35 per hour for IT staff member x 2 audits performed each year = **Annual savings of \$17,500**

### Improved Employee Productivity

Total number of employees x Estimated hours spent using unauthorized software each year x % of employees who experience downtime x Average hourly salary

**Example:**

A company with 500 employees x 156 hours using unauthorized software each year x 10% of employees experiencing downtime x Average salary of \$18 per hour = **Annual savings of \$140,400**

### Enhanced Software Compliance

Probability of audit x Number of computers x % of computers with unlicensed apps x Fine per unlicensed app

**Example:**

Assume a 15% probability of an audit x 1,000 computers x 5% of computers running unlicensed software x Average \$30,000 fine per unlicensed app = **Annual savings of \$225,000**

## Establish a Comparison Baseline

To establish a prospective before and after picture of SAM in your organization, create a comparative baseline. You can also use this information as a starting point for establishing metrics in the next section.

Ask yourself a series of simple, high-level questions, which can thereafter be drilled down for more detail and granularity. Though you may customize baseline questions to your individual organization, you may select three primary categories for assessment – *management*, *costs*, and *compliance*.

### Management

- How do you currently track your software assets and usage?
- What do you project is the accuracy percentage of that data at any given time?

### Costs

- How much do you spend annually on IT labor and software assets/licenses?
- If you need to decrease spending, what is your target budget?
- How much money is wasted annually on unused or under-utilized software, redundant licenses, true-up costs for unlicensed software, or legal penalties for non-compliance?

### Compliance

- By what method and how often do you conduct internal software audits?
- What percentage of your current IT assets includes legally licensed software? If you don't know, do you have an effective and accurate way to find out?
- Where are the gaps?
- Have you undergone external audits and, if so, what were the results?

## Develop Metrics and Processes

An internal system of metrics will enable you to track and monitor how a SAM implementation impacts your organization. Metrics may be a useful tool both before *and* after SAM is implemented.

Ultimately, you will be tracking how much money your organization currently spends on SAM processes, and if those expenditures are well utilized in maintaining the legal compliance of your software licenses. Use the categories in the above section to enter actual amounts for management costs, labor costs, license expenses, and projected costs. These numbers will allow you to see gaps between where you are now and where you want to be in terms of managing costs and risk.

You will then use this valuable information to either update or set forth new enforcement policies for software usage and desktop standards.

## Expectations and Schedule

Most commercial SAM applications require an extensive upstart process. BigFix's DSS SAM tool can, in most cases, be installed and implemented within hours or days, rather than months. Set aside adequate time with IT personnel for the initial installation and configuration of your product.

This will allow staff to become familiar with the new system. Then allocate resources for the ongoing maintenance of your SAM application tool.

## Select the Best Tool

The most common reasons for failure of a SAM program include lack of management sponsorship and poor tool selection. Selecting the right tool can be a daunting task. By far, the most successful users of SAM are enterprises that maintain a holistic view of how it can work in the short and long term. That means focusing on a tool that will help you with *all* aspects of software asset management, not just the legal compliance aspect.

Successful SAM programs begin with a vision. And when this vision is clearly defined from the beginning, you can easily translate that vision into a salable concept to management and a workable model for IT.

### Tips for Tool Selection

1. Develop a vision for SAM. Include where you are now and where you want to be, to help you determine what you need from a SAM tool or product.
2. Assess the needs of stakeholders and affected departments to build a functional requirement specification.
3. Create a short list of SAM applications and arrange demonstrations with stakeholders.
4. Once you've narrowed down the best SAM tool for the specific needs of your enterprise, arrange for an evaluation of the product to demo how it would behave in your environment.

# Implementing SAM

## A Best Practices Approach

In general, about 30% of large enterprises experience one on-site software audit per year. Whether or not you're in this percentage group, you need a rigorous software tracking tool to ensure audit-readiness throughout your enterprise.

Employing a Best Practices approach to managing your software assets can elevate audit-readiness up a few levels, improving things like purchasing arrangements and negotiating power with software vendors, risk management posture, and a competitive advantage. This methodology is critical to your compliance with laws and regulations governing the legal use of software on your company's IT resources. This approach can also help lower the total cost of ownership (TCO) by reducing maintenance costs associated with manual tracking and reporting methods, redeploying an existing license by an employee who is replaced or has moved to another position within the company.

According to ECP Media, a best practice is defined as “a set of tools and processes designed to maximize efficiency and productivity of a given task or outcome. It falls somewhere between a framework – a high-level description of a task or process – and a standard, which describes specific and measurable outcomes.”

### What's the Difference Between a Standard and a Framework?

ITIL®, the Information Technology Infrastructure Library, is a framework — not a standard — outlining a set of assumptions guiding the design of underlying processes. Organizations can use ITIL as a guide for developing processes and procedures.

Standards, derived from numerous implementations of a framework, are viewed across the industry as a crucial step in turning best practices into reality. They set out requirements for management systems, service planning and delivery, process relationships and process control and release.

The U.K.'s Office of Government Commerce (OGC) developed the ITIL framework. The British Standards Institute (BSI [www.bsi-global.com](http://www.bsi-global.com)) and Standards Australia (AS 8018 [www.standards.org.au](http://www.standards.org.au)) and the International Standards Organization ([www.iso.org](http://www.iso.org)) have codified service-management standards based on ITIL. The existence of a standard set of processes and procedures offers both tool providers and end users the opportunity to be evaluated and certified compliant with the standard.

The OGC published (September 2003) a volume on software asset management as part of its ITIL series and the BSI, along with the U.K.'s Federation Against Software Theft ([www.fast.org.uk](http://www.fast.org.uk)), collaborated on an unpublished standard for software compliance (unpublished manuscript FSSC-2:2004). ISO 19770-1 (to be released May 2006) is the first software asset management processes standard. These are the only guides we've seen covering these subjects in some depth.

[Best Practices in IT Asset and Software Management, ECPweb.com, September 2006. Used by permission.](#)

A comprehensive, industry-wide standard for SAM is available in the International Standard ISO/IEC 19770-1:2006. This Standard was developed to facilitate enterprises in auditing their SAM performance to a level sufficient to meet corporate governance obligations and manage costs associated with effectively monitoring use of installed software across your enterprise.

For the purpose of this Guide, it is assumed that best practices will be used to manage the implementation of SAM within your enterprise.

## Service Level Agreements

Your SAM implementation should be directly related to all internal and external service level agreements (SLAs) that contain regulatory, compliance and customer protection requirements. Best practices dictate the need to implement SAM in a way that reinforces the intent of your SLAs. Conversely, SLAs should be written so that they do not hinder your SAM implementation.

## Software Inventory Review

At this stage of your research, you will be taking an inventory of your existing software assets. This can be done manually, but you have already most likely selected a tool that will automate this process for you.

Consider how often you want to take inventory, and set preliminary parameters for the inventory process. What, specifically, are you going to look for? An inventory of software can reveal your level of legal compliance, which machines are running unauthorized software, and which machines are out of date with patches and service packs. It can also allow you a bird's eye view into how particular departments use applications – this can enable you to set up computer groups and set software use standardization practices company-wide.

## Software License Review

Once you've taken an inventory of the software assets in your system, you will then sync up your inventory with your list of current, active software licenses. To do this, first research where in your enterprise these licenses are maintained, how they are they categorized, and who maintains them. Then begin reviewing the specifications of each license. What does it require? Then locate each software asset to match usage against license requirements. Best practices to keep in mind:

- Designate specific personnel for software purchasing and contract maintenance.
- Contact each publishing vendor to determine their individual criteria for “proof of ownership” in the event of an audit – ensure that you have and maintain those records and can access them quickly.
- Establish a documentation system for the storage, review, and maintenance of software license documentation, whether hard copy or electronic.

## Software Catalog Preparation

**Note:** To install your catalog, see the BigFix DSS SAM *Installation and Configuration Guide*.

It is vital to your SAM implementation that your Software Catalog contains all of the software publishers, titles and software versions that are integral to your daily business. BigFix DSS SAM automates software identification by using its extensive software database to locate evidence of installed applications and comparing that evidence to the catalog.

DSS SAM version 1.1.2 comes with an Ambiguous Software tool, which takes the guesswork out of software redundancies. A redundant or “ambiguous” software product could be a standalone version of Microsoft Word that’s also included in a Microsoft Office Professional product. It is common for there to be similar, or even identical, executables relating to the same software application. This duplication can occur for a number of reasons. But the primary job of the Ambiguous Software tool is to search for the “package data” that relates to that executable – this may be found data from a BigFix analysis property (for example, one that returns the contents of the Windows Registry). These package “strings” are the key to differentiating ambiguous software entries in your catalog.

DSS SAM analyzes how various software titles are packaged to generate reports that are relevant to your specific needs. Once you understand DSS SAM’s capabilities, you can customize your catalog to satisfy your compliance needs and control costs associated with unused or unnecessary software in your network.

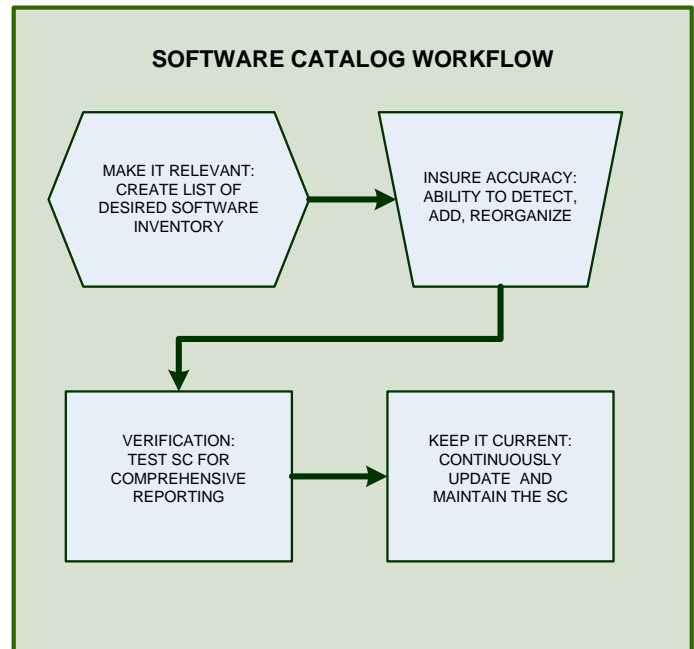
The Software Catalog Workflow figure shows the process required to prepare, verify, test and maintain your Software Catalog.

Your Software Catalog is a fundamental element of your software asset management solution. It allows you to manage your assets more effectively and control costs by identifying redundant, unused, or under-utilized software. It is your primary data source for generating the relevant reports needed for meeting compliance obligations and satisfying auditors.

There are four primary and distinct steps you must take to maintain an accurate, up-to-date software catalog:

- Make It Relevant
- Ensure Accuracy
- Verify
- Keep it Current

These four steps require some thought and planning at the beginning to tailor the catalog for your company, and are described in more detail on the following page.



## Make it Relevant: Create List of Desired Software

The majority of the software you need is already in the DSS SAM Software Catalog. However, you may encounter new software titles needed for your enterprise. In this case, your primary job is to make this software “relevant” and ensure that all of the software assets owned by your enterprise are legally compliant and up to date.

Studies have shown that fully half of companies based in the United States are 10% or more noncompliant with software licensing across their organization. Auditors are trained to look for these gaps, and the remediation is costly and time consuming. The need for a comprehensive list of your installed software is crucial to being audit ready. To start creating your list of desired software, consider the following:

- What do you want to track?
- How do you want to track it? By installation, by location, or by license?
- Do you know exactly what your compliance obligations are? Are you aware of the relevant legal standards?

When beginning to monitor specific software applications, consider the following factors:

- When, where, and how the software is used
- The way different groups use a particular application
- If the manner and frequency of use of this application matches the cost
- If overall that application is helping or hindering the evolution of your business

DSS SAM will help you compare your list against the evidence imported from your network endpoints using the Software Catalog. It does this by identifying unmapped packages or executables, or software that is not integrated in your Software Catalog.

## Ensure Accuracy: Detect, Add and Reorganize

Your initial inventory reports may not always tell you what you need to see. Certain software titles present in your environment may be included in the Software Catalog but do not yet have complete information. The information in the Catalog may not accurately match your specific environment, so as a result these titles are not yet properly identified. They are made visible once you have endorsed their relevance to your environment. Your SAM application allows you to view all of the raw data from the scan, including any unmapped executables.

From this list, you can:

- Find the titles and versions you own and compare them to the Catalog contents
- Copy any unmapped publisher/title/version strings
- Add them to the catalog if they don't already appear
- Verify that they were properly added

For detailed procedures on how to customize the SC, see the BigFix® DSS SAM Software Catalog *Editor's Guide*.

## Verify Your Data: Test SC for Comprehensive Reporting

Once the SC is updated and concurrent with the installed software base, it is important to check its content against fresh scans to verify that nothing of any relevance has been left out. Design your processes to make sure that DSS SAM reports exactly the information you need to fit your business requirements.

You might consider testing your data by configuring one or more designated end points in your network. Check the accuracy of your Software Catalog against a known list of software titles and versions installed on those end points. You should also consider verifying your ability to generate reports based on the test data. The above diagram illustrates how a test might be set up to verify that each part of your SAM implementation, including your Software Catalog, is fully functional. In performing such tests, it is important to think about the various facets of how SAM operates and ensure that each one is operating as expected.

## Keep it Current: Continuously Update and Monitor the SC

Updating is the way you customize the SC to fit your environment. This is absolutely necessary to leverage all of DSS SAM's compliance and cost saving benefits and get the maximum ROI as early as possible.

Things to think about:

- Frequency of updates – how often will you check the Software Catalog against the installed software base? Weekly? Monthly? Only when new software is installed? Do your internal compliance policies specify how often you check for software compliance?
- Software can be installed by the end user, by the IT department or by automatic updates that download and install newer versions when available. Temporary employees may also be a risk for non-compliant software installations. These need to be discovered, addressed, and monitored to ensure that you remediate these issues prior to an audit.
- Your Software Catalog is the heart of your compliance goals, and a healthy “heart” is essential for the health of your enterprise.

## Set Long Term Policies and Procedures

In order to maximize the usefulness of your SAM application, you need to set specific policies throughout your organization for software usage and desktop practices. This is important to maintain SAM as a *living system* within your enterprise – and to use this dynamic tool the way it is designed. Create a strategic program around your SAM tool to continuously evaluate, monitor, and respond to your organization's use of its software assets. Create flexible policies that allow for changes in your organization – personnel, technology, and industry changes in usage and applications.

## Summary

Establishing a SAM program within your organization can seem daunting if you have no other processes like this in place. The best thing you can do is to start small. Begin with a vision of how

you want your software assets to look and how you'd like them to be maintained. Then take an inventory of your assets and licenses – you may be closer to compliance than you thought. But when it comes to legal compliance, isn't it ultimately better to know than to wonder?

Your SAM product will serve as a lens to display and magnify the software products installed in your organization, which will allow you to make decisions about what to do with them. And SAM will be the tool that helps *bring* and *keep* you in compliance.

**Benefits of Applying Best Practices to your SAM implementation:**

- Helps you fulfill your company's compliance obligations
- Allows you to analyze your software and licensing contracts by providing you with detailed, accurate reports
- Affords you the best possible ROI for managing your software assets

**Proper implementation of BigFix DSS SAM allows you to:**

- Manage your software life cycles
- Track IT contracts
- Reconcile your software deployment and usage
- Manage costs associated with your software
- Get control of your inventory to pass audits quickly with the least amount of remediation

**Summary of SAM General Benefits:**

- Constantly accurate software inventory
- Always know who is using what software
- Easily identify unused or under-used software
- More bargaining power with software vendors by knowing exactly how many licenses you have, how many you need, and whether you qualify for bulk discounts
- Impress the board with software budget requests that are based on accurate, up-to-date information and analysis
- Effective future planning with clear understanding of legal license requirements
- Upgrades that are more targeted and cost-effective
- Greater control over software for reduced cost and enhanced productivity
- Reduced chances of viruses and defective software by running only authorized software on systems

# Resources

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## Tips and Tricks

- Read the System Requirements in the DSS SAM *Installation and Configuration Guide*.
- Make sure you have a definitive software library.
- Whenever you procure new software, check that it's recognized correctly in the DSS SAM Software Catalog. Check the DSS SAM *Software Catalog Editor's Guide* for more details.
- Use BigFix platform for software deployment when you deploy software. Create a contract in DSS SAM when you allocate software to computers.
- Computer Groups can be used for asset management *and* for contract management. For contract management, be sure to scope your computer groups so that they correspond to the specific business units you want to analyze – for example, analyzing the software license properties for software grouped to a particular department at a university.
- Set up User Accounts carefully. Ideally you will have one domain user account with the following permissions:
  - Permission to install the application on your DSS SAM server
  - Permission to connect to your database server and create databases
  - Permission to connect to your BES database and read data
  - Permission to read data from the BES server upload manager directory

## FAQs

- **Is SAM designed to be used in lieu of an audit?**  
No. SAM processes and applications are designed as a tool to protect your enterprise in the event of an audit, and to keep you compliant on an ongoing basis.
- **In what ways can my company save money by implementing SAM?**  
Reduce legal risks due to software license non-compliance, take control of unauthorized software usage or unused software applications for reduced waste, reduce software licensing costs by purchasing/renewing only what you need, and reduce IT costs by streamlining SAM practices.
- **How can I track these savings?**  
Perform an internal audit on how much your organization currently spends on the ongoing maintenance of software asset management and software publisher license compliance. Create before/after metrics to track how much the automation of your SAM application is saving you overall – in direct costs, labor costs, and maintenance.

- **Is SAM *only* about regulatory compliance?**  
SAM enables you to not only identify but also control and mitigate software risks by keeping your software licenses up to date. But it also gives you the added security of seeing and knowing exactly what assets you have in your environment.
- **How do software license trade associations and regulatory agencies decide who and when to audit? Are agencies contacted by software publishers?**  
Very often, license regulators initiate software license investigations based on consumer leads. Each association and agency has their own criteria. To learn about these and how to keep your enterprise protected, check their individual websites.
- **Is my company *really* at risk of being targeted for illegal use of software?**  
Now, more than ever, corporations are under the microscopes of the license compliance regulatory agencies. Your losses relating to a non-compliance audit can range from \$35k-\$250k... *per* copyright.
- **If my company is audited, who are the most likely auditors for software licensing?**  
[BSA – Business Software Alliance](#) and [SIIA – Software & Information Industry Association](#) (formerly Software Publishers Association) are the two most likely trade associations to initiate a software license investigation.
- **If I'm audited by a compliance SWAT team and pay all fines, are my worries over?**  
Enforcement groups will generally require you to set in place *and maintain* an approved software asset management program. In the event of follow-ups, prepare to proactively protect your assets for the long haul and DSS SAM is an excellent place to start.
- **What's the difference between ITAM and SAM?**  
ITAM stands for information technology asset management, which includes an accounting of all IT assets (hardware, software, network facilities, telecommunications, digital assets, etc.). SAM, on the other hand, stands for software asset management, a practice that primarily focuses on the “software” asset area of ITAM.

## Additional Documentation

This Software Catalog Visual Guide is part of the DSS SAM Documentation Toolkit. Other documents within the kit include:

- **Installation and Configuration Guide** – A detailed guide on the installation and configuration of the DSS SAM application.
- **User's Guide** – A detailed guide focused on how to use the primary components, including Tips and FAQs.
- **End User QuickStart** – A brief overview to help you quickly get started using DSS SAM 1.1.2.
- **Software Catalog Editor's Guide** – Detailed information about how to use and customize your Catalog, and how to make it match the software in your deployment.

- **Release Notes** – A listing of the current Known Issues including descriptions and workarounds, along with System Requirements and Support information.

## Global Support

BigFix offers a suite of support options to help optimize your user-experience and success with this product. Here's how it works:

- First, check the BigFix website [Documentation](#) page:
- Next, search the BigFix [Knowledge Base](#) for applicable articles on your topic:
- Then check the [User Forum](#) for discussion threads and community-based support:

If you still can't find the answer you need, [contact](#) BigFix's support team for technical assistance:

- Phone/US: 866 752-6208 (United States)
- Phone/International: 661 367-2202 (International)
- Email: [enterprisesupport@bigfix.com](mailto:enterprisesupport@bigfix.com)