



Use Case: Microsoft

True-Up

DSP001_0001

May 2020

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1. Preparation

1.1. Outcome

Take command of your software assets.

Software can represent over 20% of IT budgets, and managing it is complicated. Dynamic environments and increasingly complex licensing schemes prohibit visibility into use and entitlement. Legacy point tools require fragile integrations that must be monitored, managed, and maintained. The result is an inefficient IT patchwork that ineffectively addresses the software visibility issue.

Take control of licenses by procuring, managing, and optimizing the software needed to align with the business using Software Asset Management (SAM). Embedding SAM natively into everyday IT management is a proven game changer. Get even more value out of existing Now Platform investments and intuitive workflows to modernize and simplify how work gets done

1.2. Characters

Name	User Role/ Personal	Login ID	Password
Admin	System Admin		
Casey Kuhn	Software Asset Manager		
Joe Employee	End User, Requestor		

1.3. Products and Platform Features

List each of the products and platform features highlighted in the narrative.

Name	Description	Documentation or Video	SKU
SAM-Pro	Microsoft True-Up SAM Dashboards		SAM-Pro

1.4. Steps before delivering a SAM demo

Before we get started, let's refresh the SAM compliance positions.

- Logon as **Casey Kuhn**.
- We've created a list of **Favorites** for Casey Kuhn.
- Click **SAM Demo Prep** from the Favorites.
- Click **Historical Results** from the Favorites.
- Confirm **Reconciliation Results** job is complete.

Number	Last reconciled	Plan for	Publishers	Group	Subgroup	Status	Progress
RR000007	2019-08-27 15:01:01	All Publishers	None	None	None	Completed	100%
RR000008	2019-08-27 15:51:20	All Publishers	None	None	None	Completed	100%
RR000003	2019-08-27 13:12:51	All Publishers	None	None	None	Completed	100%
RR000009	2019-08-28 08:48:41	All Publishers	None	None	None	Completed	100%
RR000002	2019-08-27 09:27:57	All Publishers	None	None	None	Completed	100%
RR000001	2019-08-27 04:21:51	All Publishers	None	None	None	Completed	100%
RR000005	2019-08-27 14:40:12	All Publishers	None	None	None	Completed	100%
RR000006	2019-08-27 14:41:04	All Publishers	None	None	None	Completed	100%
RR000004	2019-08-27 13:27:57	All Publishers	None	None	None	Completed	100%

2. Use Case: Microsoft True-Up

Use case description:


It is time for our annual Microsoft true-up.

Customers enrolled in a Microsoft Enterprise Agreement are required to submit an annual True-up to account for changes in their software usage.



Let's take a look at how Casey can use ServiceNow to manage this process.


Persona: [Casey Kuhn – SAM Admin](#)


Demonstration Steps:

Frame	Narrative	Instructions
Software Publisher Overview	<p>The Microsoft dashboard is the first tab we see in the Publisher Overview set of dashboards.</p> <p>All of the Publisher Overview dashboards leverage Performance Analytics and are included with SAM-Pro.</p> 	<p>Logon as Casey Kuhn</p> <p>Click Publisher Overview from the Favorites</p>

	<p>Looking at the Microsoft tab, we see the compliance (true-up) details for the Publisher.</p> <p>\$185.22k – This is the amount of Microsoft software that you have installed and is currently unlicensed. In many cases, customers pay this amount in a yearly process known as the true-up, in which the licenses are paid for at a pre-negotiated price.</p> <p>If you take no action, you will write Microsoft a check at <u>list price</u> for the unlicensed installs!</p> <p>We don't want to do this!</p> <p>ServiceNow provides the true-up cost by looking at the existing software entitlements and calculating an average cost for each software model.</p> <p>\$30.43k – This number is based on software metering (usage) data. Most ServiceNow customers will have Microsoft SCCM as the inventory tool with the SCCM Agent on the desktops and laptops.</p> <p>SCCM has the ability to collect the usage/metering data and we ingest this into ServiceNow.</p> <p>This is a big use cases for saving money with SAM.</p> <p>By uninstalling software that people no longer use, we reclaim or harvest the license from the device. The reclaimed rights can be used to cover other unlicensed installs we find in the true-up.</p> <p>The goal with harvesting is to offset the true-up cost by identifying unused software and reclaiming it.</p> <p>We provide an out of the box (bi-directional) integration with SCCM. We also provide a reclamation workflow to automate the harvesting process.</p> <p>We'll look at that more here in a bit.</p> <p>Let's dig into the 3 Microsoft software titles that are out of compliance.</p>	
		<p>Click</p>

	 <p>We see that Project 2016 Professional is Not Compliant.</p> <p>37 unlicensed software installs with an estimated true-up cost of \$43,955!</p>	
<p>Software Model Results</p>	<p>Let's dig into Project 2016 Professional.</p>  <p>In the License Metric Results tab, we see the following.</p> <ul style="list-style-type: none"> - We own 100 rights of Project 2016 Professional - We are consuming 137 rights - We have 37 unlicensed installs we need to account for. <p>Expand the Per Device branch to see the breakdown of installs that are consuming the rights.</p>	<p>Expand the Project branch on the navigator</p> <p>select 2016 Professional Windows.</p>

	 <p>You may have noticed a few columns referencing Allocations. This is an internal way for a customer to track who is authorized to have the software installed.</p> <p>Allocations are optional - typically a phase 2 item.</p> <p>Allocations are a nice way to ensure that all software installs follow a workflow/approval process, ideally leveraging Service Portal and SCCM.</p> <p>Let's take a look at how ServiceNow leverages software usage data to enable reclamation/harvesting.</p>	<p>Expand the 2016 Professional Windows branch on the navigator</p> <p>Select Per Device.</p>
<p>Software Model Results</p>	<p>The Remediation Options tab provides a list of actions available to address the non-compliance issue.</p> <p>For example, if we setup Allocations for this product, we could kick off workflows to automate the harvesting of unallocated installs.</p> <p>We could also create a purchase request to buy the 37 rights we need by selecting Purchase Rights.</p>	<p>Select the 2016 Professional Windows branch again in the left pane.</p> <p>Click on the Remediation Options tab.</p>

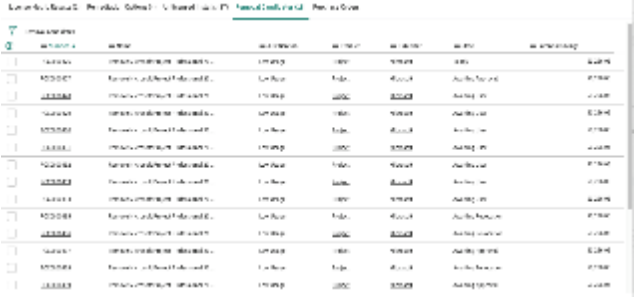



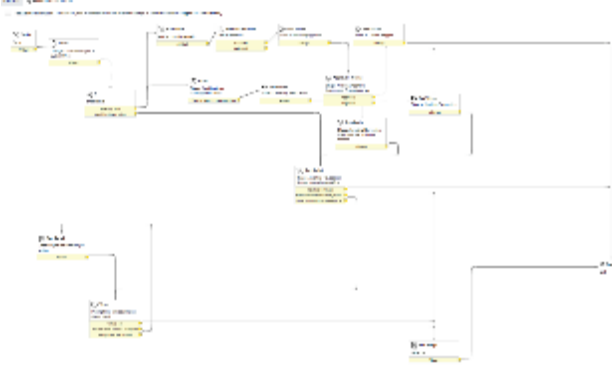
Before we do that, let's make sure we only buy licenses that we need.

The **Removal Candidates** tab shows us information based on the SCCM **Last Used Date** and/or metering data – (**Total Seconds Used**).

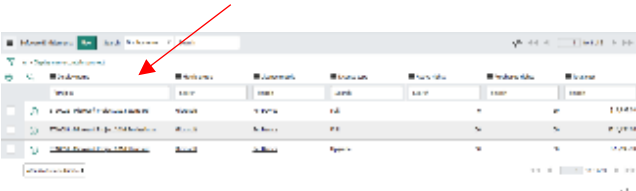
We see 18 devices have **Project 2016 Professional** installed but are not using the software. Each of these is a candidate for uninstalling and harvesting the rights.

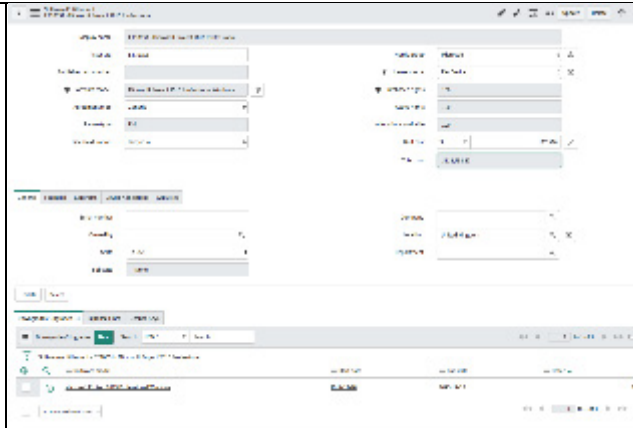
Remember that each install we harvest saves us money on the true-up and helps right size the software estate!

		<p>Click on the Re-removal Candidates tab.</p>
<p>Removal Candidate</p>	<p>In the Removal Candidate, you can see details of the harvesting opportunity.</p> <p>ServiceNow provides a Reclamation workflow to help automate this process.</p> <p>You see the phases of this workflow along the top of the record.</p> <p>We also see the Configuration Item (*DAVIN-IBM) and the User (Davin Czukowski) of the device.</p>  <p>The Reclamation workflow is included with SAM-Pro.</p>	<p>Click on the Removal Candidate (RCC0000428).</p> <p>Click Show Workflow at the bottom of the Removal Candidate</p>

	 <p>Customers can configure this workflow</p> <p>A few examples...</p> <ul style="list-style-type: none"> - Remove the step to seek approval before uninstalling certain software products - - Add a manager approval/notification step if the user decides to keep the software - - Exclude users/groups from the reclamation process. - <p>The CEO might not be very happy if you remove his/her software...</p> <p>The end result of the workflow is ServiceNow sending instructions to SCCM to drop the specific installation into the SCCM <u>uninstall collection</u>.</p> <p>SCCM does the uninstall and updates ServiceNow to close the loop.</p> <p>The reclamation piece also leverages our Client Software Distribution plugin.</p> <p>We include a limited access use of this plugin with SAM-Pro that provides <u>unlimited</u> harvesting transactions.</p> <p>Go back into your Project 2016 Pro software model result.</p>	<p>Go ahead and Close the tab that shows the workflow.</p> <p>Click the back arrow to go back into License Workbench</p>
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<p>Remediation Options</p>	<p>Harvesting is a great way to optimize the license position by uninstalling software that is not being used.</p> <p>However, there will be times where we may need to purchase licenses in order to address a non-compliance license situation.</p> <p>Below we see an option to Purchase Rights for the 37 unlicensed software installs.</p> <p>From here we could create a request to buy the 37 rights to get us back into compliance.</p> <p>Depending on how we are buying these licenses typically determines if you do this on a transactional basis or via an annual 'true-up' process.</p> <p>Fulfillment of the purchase request can be driven by ServiceNow workflow and can involve integrations with 3rd party procurement systems e.g. SAP Ariba, Oracle, Coupa etc.</p>	<p>Click on the Remediation Options tab.</p> <p>Click on Purchase Rights</p> <p>This is where you would create the Request.</p> <p>We will stop here for the demo. It's a good place to pause and do discovery into the existing SAM procurement process.</p>

	<p>Here is an example of what the procurement loop could look like.</p> <p>ServiceNow creates a Request in the Procurement system</p> <ul style="list-style-type: none"> - PO created in Procurement system - PO received in Procurement system - SW Entitlements imported into Service-Now <p>Professional Services recommended to build this out.</p>	
<p>Software Entitlement</p>	<p>Let's now take a look at a software entitlement record for</p> <p>Project 2016 Professional</p>  <p>The screenshot shows a table of software entitlements with columns for 'Display Name', 'Product', 'Status', 'Start Date', 'End Date', 'Quantity', and 'Unit Price'. The first row is highlighted, showing 'Project 2016 Professional' in the 'Display Name' column.</p>	<p>Click Software Entitlements from your Favorites.</p> <p>Filter on Display name = (*project)</p> <p>Select the ET10051 - Microsoft Project 2016 Professional Windows record from the list</p>



Background



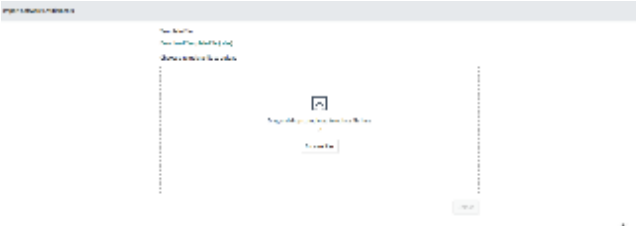
- This is a net new capability; driving automation of downgrade content creation.
- Description of feature :
 - Content service will provide downgrade rights for Microsoft products from most recent version to 2012.
 - Auto generating downgrade rights will help customers to define their downgrade rights on the software model and entitlement without having to define them individually every single time on entitlement creation.
 - These downgrade rights will cascade to software model form and entitlement form; if a user uses a DMAP that has downgrade rights associated to it.
 - Users will have the ability to manually add downgrade rights on software model form and entitlement form if they are not provided through content.
 - Users will have the ability to manually de-activate downgrade rights on software model form and entitlement form.

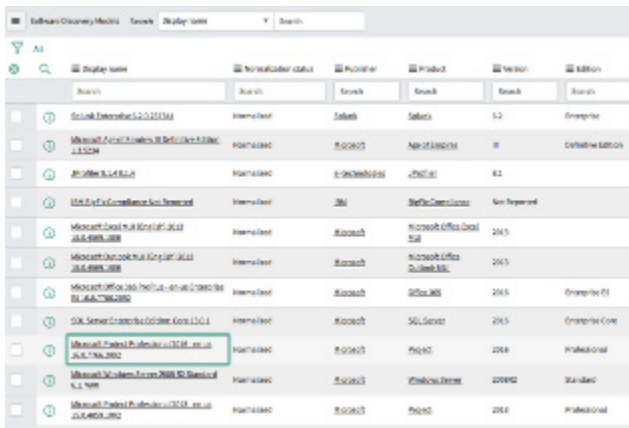
now

Here are a few talking points...

- **Publisher Part #** can be used as a key field for setting the Software Model. We manage publisher part numbers in our Content Library
- **License Metrics** drop down tells us how to count the rights.
- **Financial** tab is where we track procurement/cost details.
- **Contracts** tab is where we tie back to the Contracts table.
- Contract example – **(Microsoft Enterprise Agreement)**.
 - 1 Contract can have 1:N Software Entitlements under it.
 - Contracts included with ITSM.

Now is a good time to mention a new capability in the New York release...

	<ul style="list-style-type: none"> - Support of Microsoft Software Assurance (SA) licenses - Windows Server and SQL Server products - Version 2012 and higher <p>TLDR: We automatically set the Upgrade/Downgrade paths for Software Assurance software entitlements on most Windows Server and SQL Server Products as part of the normalization loop.</p> <p>Importing software entitlements...</p> <ul style="list-style-type: none"> - ServiceNow also provides an XLS template for bulk import of your software entitlement data.  <p>The recommended design for creating new Software Entitlements is a bi-directional web service integration with the procurement tool. Again, this requires Professional Services.</p> <p>Now let's pivot to how we normalize the raw software inventory that flows in from SCCM and our Discovery product.</p> <p>Software normalization is a key component of SAM.</p> <p>The normalization process runs through the Discovery Model table, looking at the following 3 fields.</p> <ul style="list-style-type: none"> - Discovered Publisher - Discovered Product - Discovered Version 	
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	<p>These 3 fields are reconciled against the normalization rules in our Content Library. When a match is found, normalized data is updated into the Discovery Model.</p> <p>The 3 updates fields to focus on are.</p> <ul style="list-style-type: none"> - Publisher - Product - Version <p>The normalized Discovery Models allows us to match up the software installs with the purchased rights and calculate license positions.</p> <p>Companies have the option to contribute to our Content Library by submitting unmatched Discovery models to ServiceNow for review. This is often referred to as the normalization loop.</p> <p>The conversation can quickly get into the weeds. It's usually best to discuss normalization at a high-level in the opening demo.</p>	<p>Click Import Entitlements from your Favorites</p>
<p>OPTIONAL</p> <p>Discovery Models</p>	<p>If you do need to go a bit deeper....</p> 	<p>Click Discovery Models from your Favorites.</p> <p>Click on the info icon next to the Project 2016 Discovery Model.</p>

Name	Vendor	Product	Version	Edition	Product Type	Normalization Status
Microsoft Office Word	Microsoft	Microsoft Office Word	2016	Home Use	Office	Normalized
Microsoft Office Excel	Microsoft	Microsoft Office Excel	2016	Home Use	Office	Normalized
Microsoft Office PowerPoint	Microsoft	Microsoft Office PowerPoint	2016	Home Use	Office	Normalized
Microsoft Office Outlook	Microsoft	Microsoft Office Outlook	2016	Home Use	Office	Normalized

This is where keep the raw software inventory data.

Again, the following 3 fields are populated by the inventory tool:

- Discovered Publisher
- Discovered Product
- Discovered Version

The normalization rules in the **Central Software Library** look at the above 3 fields and update the **Discovery Model** with normalized data:

- Publisher
- Product
- Version
- Edition
- Product Type
- Normalization Status

The normalization process is managed by a collection of **Scheduled Jobs** that can be adjusted as needed.

Unrecognized **Discovery Models** are sent to Service-Now for review, and new rules are added to the **Content Library** as needed.

This is often referred to as the **normalization loop**.

	<p>Most customers will slice and dice the License Position Report by Publisher/Product to get the sub-set of compliance positions they are looking for.</p> <p>With a few clicks the results can easily be exported to a flat file or XLS.</p> <p>Congrats, you completed Scenario 1.</p>	<p>Expand the Oracle branch.</p>
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