

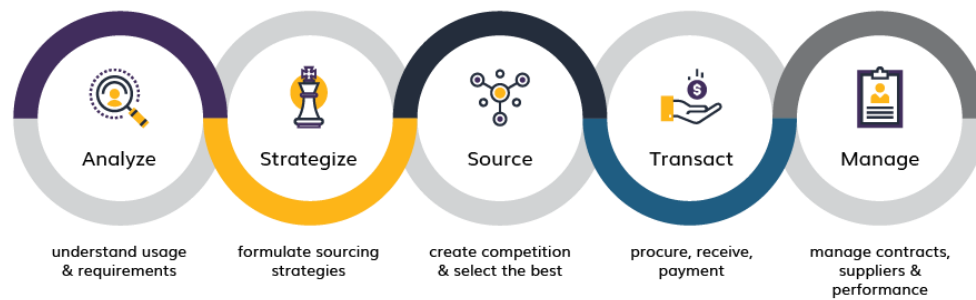
Software License Management Services

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1.1 License Procurement and Consulting Services



Identify Your Needs:

Determine the specific IT licenses required for your organization based on the software and tools used. Consider factors such as the number of users, type of licenses (e.g., subscription-based, perpetual), and any compliance requirements.

Research Vendors:

Look for reputable vendors or consulting firms that specialize in IT license procurement and consulting. Consider factors such as vendor reputation, experience, and the range of services offered.

Request Proposals:

Reach out to selected vendors and request proposals outlining their approach to IT license procurement and consulting. Inquire about their process for assessing your organization's needs, recommending suitable licenses, and providing ongoing support.

Evaluate Proposals:

Review the proposals received, comparing factors such as cost, proposed licensing solutions, consulting services, and support offerings. Consider scheduling meetings or calls with the vendors to discuss their proposals in more detail.

Select a Vendor:

Once you've evaluated the proposals and had discussions with the vendors, select the one that best aligns with your organization's needs, budget, and overall objectives.

Procurement and Consulting Process:

Work closely with the chosen vendor to initiate the procurement process for the required IT licenses. This may involve negotiating pricing, finalizing license agreements, and establishing a consulting plan tailored to your organization's needs.

Ongoing Support:

Ensure that the chosen vendor provides ongoing support for license management, compliance, and any consulting services agreed upon. This may include regular reviews of license usage, assistance with compliance audits, and guidance on optimizing license utilization.

1.2 License Inventory and Audit Documentation

Gather Information:

Collect all existing IT licenses, including software, hardware, and any other IT-related products. This may involve reaching out to different departments or teams within your organization.

Document Licenses:

Create a comprehensive document that lists all the IT licenses, including details such as the license type, the number of licenses purchased, expiration dates, and any other relevant information.

Verify Licenses:

Cross-check the documented licenses with actual usage to ensure that all licenses are being used appropriately and that there are no discrepancies.

Audit Compliance:

Review the documentation to ensure that your organization is compliant with all license agreements and that there are no instances of unauthorized software usage.

Renewal Planning:

Identify licenses that are nearing expiration and plan for their renewal to avoid any disruptions in IT operations.

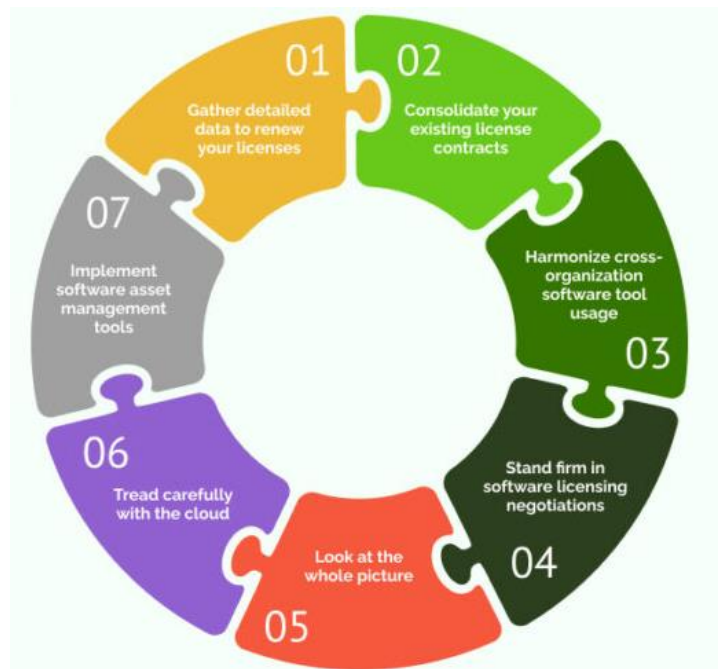
Centralize Documentation:

Store all the documentation in a centralized location that is easily accessible to relevant personnel within your organization.

Regular Updates:

Establish a process for regularly updating the IT license inventory and conducting periodic audits to maintain compliance and accuracy.

1.3 License Optimization and Cost Reduction



License Inventory:

Start by conducting a thorough inventory of all software licenses in use across your organization. This will help you understand what you have, what is being used, and what might be redundant.

Usage Analysis:

Analyze the actual usage of software licenses to identify any underutilized or unused licenses. This can help you make informed decisions about which licenses can be reduced or reallocated.

Consolidation:

Look for opportunities to consolidate licenses by standardizing on a smaller set of software products. This can often lead to volume discounts and reduce the overall number of licenses needed.

Negotiate with Vendors:

When it comes time to renew licenses, consider negotiating with vendors for better pricing or more flexible terms. Vendors are often willing to work with you to keep your business.

Implement License Management Tools:

Consider implementing specialized software tools that can help you track and manage software licenses more effectively. These tools can provide real-time visibility into license usage and help you make data-driven decisions.

Cloud Migration:

If applicable, consider migrating to cloud-based software solutions, which often offer more flexible licensing models and can help you avoid over-licensing.

Educate Users:

Educate your employees about the importance of using software licenses responsibly. Sometimes, over-licensing can occur due to a lack of awareness about the implications of license misuse.

1.4 Compliance Management



Identify Applicable Regulations:

Determine which laws, regulations, and standards apply to your organization based on its industry and location.

Assess Current State:

Evaluate your current IT practices and systems to identify any areas of non-compliance.

Develop Policies and Procedures:

Create comprehensive policies and procedures that align with the relevant regulations and standards.

Implement Controls:

Put in place technical and procedural controls to ensure compliance with the established policies.

Training and Awareness:

Educate employees about IT compliance requirements and the importance of adhering to them.

Regular Audits and Reviews:

Conduct regular audits and reviews to assess compliance and identify areas for improvement.

Incident Response Plan:

Develop a plan to address any compliance breaches or incidents that may occur.

Documentation and Reporting:

Maintain thorough documentation of IT compliance activities and report regularly to relevant stakeholders.

1.5 Software Asset Tracking and Reporting

The screenshot displays the Atera RMM Software Asset Tracking and Reporting interface. The interface is divided into a sidebar and a main content area. The sidebar, titled 'Software Inventory', contains a search bar and several filter options: 'Customer Name(s)' (set to 'All'), 'Filter By' (set to 'No filter'), 'Agent Type' (set to 'All'), and an 'Exclude retired devices' checkbox. A 'Generate' button is located at the bottom of the sidebar. The main content area, titled 'Software Inventory', features a 'Summary' box showing 'Total Software: 6436' and a table of software assets. The table has columns for 'Software Name', 'Software Publisher', 'Size', 'Software Version', and 'Number of Devices'. The table lists various software assets, including PDFZilla, 1ACCESS version_051520, 2007 Microsoft Office Suite Service Pack 3 (SP3), 2007 Microsoft Office system, 3CX Desktop App, and 3CX Phone System. An 'Export' button is located in the top right corner of the table area.

Asset Discovery:

Atera RMM can automatically discover software assets on your network. Ensure that the discovery settings are configured to scan all devices for installed software.

Asset Classification:

Once the assets are discovered, classify them based on their type, such as operating systems, productivity software, security tools, etc.

Asset Tracking:

Atera RMM provides tools to track the usage, licensing, and version information of the discovered software assets. You can use these features to monitor software installations, updates, and usage across your network.

Reporting:

Atera RMM offers reporting capabilities that allow you to generate reports on software asset inventory, license compliance, usage statistics, and more. Customize these reports to meet your specific tracking and reporting needs.

Alerts and Notifications:

Set up alerts and notifications within Atera RMM to be informed of any unauthorized software installations, license violations, or other relevant events.

1.6 Vendor Management

Performance Monitoring:

Regularly monitor the performance of customer vendors and the satisfaction of customers. Address any issues promptly and work towards continuous improvement.

Relationship Building:

Invest time in building strong relationships with your vendors and customers. Understand their needs, and work towards meeting and exceeding their expectations.

Clear Communication:

Establish open lines of communication with both vendors and customers. Clearly communicate your expectations, requirements, and any changes in a timely manner.

Vendor Support:

Understand the level of support provided by the vendor and establish communication channels for seeking assistance when needed. This may include access to technical support, knowledge bases, and user forums.

Feedback Mechanism:

Establish a feedback mechanism to gather input from both vendors and customers. Use this feedback to improve your processes and relationships.

1.7 License Renewal and Upgrade Management



Check the expiration date of your current license to ensure you initiate the renewal process on time.

Contact the software vendor or manufacturer to inquire about the renewal process and any available upgrade options.

Obtain a quote for the renewal and upgrade costs, if applicable.

Review the terms and conditions of the renewal and upgrade to ensure they meet your organization's needs.

Once you have agreed to the terms, proceed with the payment for the renewal and upgrade.

After payment, you should receive a new license key or file to activate the upgraded software.