



SAM for Non-production Environments

Custom software development makes it challenging to work through non-production environment licensing and optimization. A non-production environment is an environment used exclusively for purposes other than production, such as when software application developers develop and test code. Optimize your licensing investments with the Non-production Environments Software Asset Management (SAM) Engagement. To maintain a healthy asset management system and get maximum value from your company's software investments, you need to understand what defines your non-production environment, who is accessing that environment, and how the software running in that environment is licensed.

If you are unsure whether or not a physical server or operating system environment should be considered production, apply the following test:

1. **Can you permanently migrate this environment offline including any data that it is consuming?**
2. **Can you do so without impacting end users?**



If the answer is "no," then you should treat the environment in question as production.

Non-production Environments SAM Engagement

The purpose of a Non-production Environments SAM Engagement is to help you get more out of your investment by optimizing your organizations production versus non-production environments while gaining a better understanding of how licensing works. Your SAM partner will help you understand the differentiators between production and non-production, MSDN and Visual Studio licensing. Your partner will also provide guidance on how you can ensure you are getting maximum value from the software your IT organization has already purchased, and best practices on which processes to implement to help reduce cost and ensure compliance. Here are some of the challenges you may be facing in your non-production environments and some of the benefits of working with a Microsoft SAM Partner on a Non-production Environments SAM Engagement.

Challenges

Non-production environments can be complex, making it difficult to:

- Understand how to differentiate between non-production and production.
- Monitor how non-production systems are deployed, developed, tested, decommissioned, and rebuilt through the application development cycle.
- Gain a clear picture of the organization's software footprint that is in use.
- Understand how users accessing your development environments need to be licensed and the options through Microsoft Volume Licensing and MSDN subscriptions.

Opportunities

Implementing SAM best practices for non-production will help you:

- Optimize non-production environments by understanding how servers are being utilized.
- Identify which servers can be repurposed or decommissioned.
- Understand common licensing mistakes, such as purchasing or renewing more subscriptions than necessary, or not taking advantage of new version rights.
- Protect developer licenses from product key leakage within and outside of the organization and implement policies for managing your organizations software assets and employee training to ensure compliance.

What to expect from a SAM Engagement

Every engagement will be slightly varied depending on your infrastructure, needs, and goals. At a high level, an engagement can be broken down into four phases: Planning, Data Collection, Data Analysis, and Final Presentation.

- 📁 **Planning** – The planning phase involves gathering information from you on your infrastructure, identifying engagement goals, securing appointments and meetings, and arranging access to begin data collection and analysis.
- 🔍 **Data Collection** – The data collection phase consists of the discovery and inventory of software assets using an inventory tool followed by the mapping of inventory data, usage, and license entitlements. This may include a questionnaire and interviews with key stakeholders to ensure all relevant data and information is collected to provide a full and accurate analysis on software deployments, licensing entitlements, and current management processes.
- 📊 **Data Analysis** – The data analysis phase includes the review and validation of all collected usage, license entitlement, deployment, and other data. During this phase, ways to optimize your non-production environment and licensing are explored to provide final engagement considerations and recommendations.
- ★ **Final Presentation** – At the conclusion of the Non-production Environments SAM Engagement, your SAM Partner will present their results, recommendations, and next steps in an overview presentation along with a detailed set of reports.

Data Collection and Analysis

A Non-production SAM Engagement can help you identify all product deployments, usage, and license entitlements. Your Microsoft Certified SAM Partner identifies areas for improvement and develops a set of recommendations and processes to help your company optimize its software investments and stay compliant. The data collection and analysis will include the categories defined below.



Asset Inventory

As a starting point, your partner will work with you to choose the right software inventory tools, define the scope of the machines to be inventoried, identify any extra steps needed to gather data from devices and networks that may not be easily accessible, and prepare environments for scanning and data collection. The inventory tools you use should collect a wide range of data points regarding non-production servers, workstations, and even mobile devices. The data will be used for planning consolidations, optimizing licensing, and defining future deployment procedures.

Data Interpretation and Technical Requirements

Analyzing the results from the inventory data collection involves identifying and documenting all product deployments, usage, and license entitlements. Your partner will combine the inventory data with other relevant information that may not be discoverable via most tools such as the identification of server naming conventions and association of servers to development, staging, testing, user acceptance testing, and production environments.

Deployment Considerations

Your partner will identify any potential improvements needed to optimize your non-production environments and ensure proper licensing. This may include incorporating best practices to support successful employee training and developer tools subscription management. Another area of consideration may include isolating production versus development environments to more easily manage and monitor deployments and licensing.

Licensing Considerations

To identify areas where you can optimize your software investments and ensure compliance, your partner will assess whether you are properly licensed for your current deployment and usage state, and recommend the best licensing options to align with your future business plans. They can determine whether you are appropriately licensed to support non-production environments such as development, staging, testing, and user acceptance.

Policy Improvements

Your partner will analyze your current SAM processes and policies. If necessary they will provide recommendations to develop or improve policies to support ongoing optimization, management, and compliance. Your partner will share some key best practices to improve your organization's software asset management program going forward.

Engagement Deliverables

Prior to working with your partner, you will receive a letter of engagement and a full Statement of Work from your partner explaining what to expect during your SAM engagement. At the conclusion of the engagement, you should receive the reports defined below.

Executive Overview Report	The executive overview report contains a high level executive summary of the engagement scope, results, recommendations, and next steps.
Established Deployment Position (EDP)	This report provides details related to all software currently deployed within your IT infrastructure.
Effective License Position (ELP)	The ELP report provides details related to license entitlements which are mapped to deployments and identifies any gaps or underutilization in your organization.
Non-production Environments Assessment Report	This assessment report includes a full set of recommendations on optimizing non-production environments, including licensing models and technology implementation that align with your business needs and future goals. This report also includes an assessment of your company's current SAM policies and procedures and recommendations for improvement.
Licensing Optimization Recommendations Report	This report provides recommendations on how to optimize your Microsoft licensing program and structure for your company. The report details risks, liabilities, and opportunities associated with your current non-production licensing practices and recommendations on how to better manage your licenses to minimize future risk.
Additional Uses of Data Report	The Additional Uses of Data Report includes recommendations on how to use the data you've collected for other purposes such as developing a virtualization roadmap, cloud migration plan, or a security assessment.

Find more about Software Asset Management at:
<http://www.microsoft.com/en-us/sam/overview.aspx>

