



Intelligent Asset Manager FAQ for SAM

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General IAM Questions

What is Intelligent Asset Manager?

Intelligent Asset Manager is a platform used during Microsoft SAM engagements to:

- Collect inventory data of deployed Microsoft software.
- Manage the status of customer engagements during the assessment and planning process.
- Securely store customer inventory data files.
- Protect sensitive organizational data via encryption and anonymization. Prepare the data file needed to import into the Analyzer.

Intelligent Asset Manager **is designed to** help streamline the conversion of raw data from inventory tools into usable and required formats. There will continue to be manual inputs into the templates, but those parts that can and will be automated should help reduce time and streamline the process. The value to the customer comes from the rich data provided in the more usable **Established Deployment Position (EDP)** and **Effective Licensing Position (ELP)** reports that will enable them to fully understand their Microsoft environment and make key technology and business decisions as a result.

For SAM Partners, using Intelligent Asset Manager will help them meet the Statement of Work requirements for Microsoft SAM engagements and drive value-based engagements for customers.

What are the core components of IAM?

Intelligent Asset Manager facilitates the collection and analysis of Microsoft software deployment and licensing data gathered for Microsoft Software Asset Management (SAM) Engagements.

- **IAM Site:** The main IAM site is where the encrypted and completed CIDC is uploaded and validated against business rules to ensure that all naming conventions align with the taxonomy used in the IAM site to generate the Established Deployment Position (EDP) report and Effective License Position (ELP). <https://www.msIAM.com/Account/Login>

What are the minimum requirements for using Intelligent Asset Manager?

Minimum requirements for Intelligent Asset Manager are:

- Users should be using Microsoft Excel 2010 or higher
- Users should be connected to the internet
- Users should have a Microsoft Account with access to Intelligent Asset Manager

How do I get access to Intelligent Asset Manager?

If you are new to IAM and requesting access for the first time, please contact your SAM Engagement Manager for assistance or IAMSupport@microsoft.com. Licensing Solutions Partners (LSPs) participating in the APEx program should send an email to IAMSupport@microsoft.com with their name, company name, title, website, country, and Microsoft account email. We will check to make sure the LSP has not already been added if they are also a SAM partner.



What is a Microsoft Account and why is this required to access Intelligent Asset Manager?

The Microsoft Account is the new name for what used to be called a "Windows Live ID." Your Microsoft Account is the combination of an email address and a password that you use to sign in to services like Outlook.com, OneDrive, Windows Phone, or Intelligent Asset Manager. Your Microsoft Account Primary Alias is used to validate user permission levels within Intelligent Asset Manager application.

As a SAM Partner user, what permissions do I have in Intelligent Asset Manager?

There are two primary SAM Partner roles: SAM Partner Admin and SAM Partner User. The table below illustrates the permissions for each role. The Geo Admin and SAM EM are Microsoft user roles.

Workspace Permissions	Geo Admin**	SAM EM	SAM Partner Admin	SAM Partner User
View all SAM Engagements within geo. or multiple geos	✓	✓		
Invite/Delete SAM EMs to the WorkSpace for all assigned geos	✓			
Add/Delete Partner Organizations to WorkSpace for all assigned geos	✓			
Invite/Delete Partner Admins* for all assigned geos	✓	✓		
Invite/Delete Partner Users	✓		✓*	
Create/Assign Engagements to Partner Organizations	✓	✓		
Add/Delete Engagements	✓	✓		
Engagement Access: Complete Engagements Workflow if no Partner involved in Engagement, within their assigned geos	✓	✓		
View all Engagements within their Partner Organization (on the Engagement Dashboard) **			✓	✓
Engagement Access: Complete Engagement Workflow for assigned Partner Engagement			✓	✓

*Partner Admins may only add Users within their organization.
 ** By default all SAM Partner Users will have access to all the Engagements assigned to their organization, however, the Partner Admin can restrict access to specific Users.
 *** The Geo Admin is the new terminology for a Microsoft user role that was previously called the Country Admin. Their main responsibility is setting up Partner Organizations and SAM Engagement Managers in their geography. The Geo Admin has access to one or multiple countries.

Can a user/email address only be assigned to one role in IAM?

For example, if I wanted to be both an admin and a regular user would I need two different accounts? Only one account is required. The Partner Administrator has rights similar to a normal SAM Partner User. The SAM Partner User only sees assignments added to him or her by the SAM Partner Admin.

How do I find out who is the SAM Partner Administrator for my organization?

Your SAM Engagement Manager can assist you in identifying your administrator by checking in Intelligent Asset Manager.

How can I better organize my Engagement Dashboard so active engagements are more visible?

Users can now "Pin" their most viewed engagements to the Engagement Dashboard. Simply click the pin icon (📌) to the left of the engagement and refresh the page to bring the pinned engagement the top of the engagement table. Pinned engagements will always appear first on your list of engagements. If you no longer wish to keep the engagement(s) at the top of the engagement table, "unpin" the engagement by clicking on the pinned icon (📌) and refresh the page. The engagement will return to the original placement within the table. Pinning is specific to the individual user's view of the engagement dashboard.

What is Intelligent Asset Manager support alias and what are the Service Level Agreements (SLAs)?

IAM-Support IAMSupport@microsoft.com



APEx-WorkSpace-Support Service Level Agreements (SLAs & KPI Definitions)

Priority	Description	Support Hours of Operation	Time to Respond	Recurring Update	Time To Resolve
Priority 1	<ul style="list-style-type: none"> ✓ Business impacting bugs (Critical issues related to production applications, DBs, or services that affect 20% or more end user base) ✓ Security and Privacy Issues ✓ No Workaround 	Mon-Fri 5 AM till 8 PM PST Tier I Mon-Fri 9 AM till 5 PM PST Tier III	2 business hours	Every 2 Hours	24 hours
Priority 2	<ul style="list-style-type: none"> ✓ Access issues ✓ User unable to work with an Engagement ✓ CRM Opportunity Issue ✓ Users Reporting being blocked due to an issue ✓ Workaround Exists 	Mon-Fri 5 AM till 8 PM PST Tier I Mon-Fri 9 AM till 5 PM PST Tier III	4 business hours initial response	Every 12 hour depending upon the issue	48 hours
Priority 3	<ul style="list-style-type: none"> ✓ End Users General Issues/ Data Related Issues/ <u>Workflow</u> Issues/ Administrative issues ✓ Business requests ✓ Business Process Questions/ Program Questions/ User Training/How to/ Feedback 	Mon-Fri 5 AM till 8 PM PST Tier I Mon-Fri 9 AM till 5 PM PST Tier III	8 business hours initial response	Every 24 hour depending upon the issue	72 Hours

Production Server Downtimes will be treated as a Priority 1 classification in accordance with the 99% Service Uptime.

	Description	Calculation	Target
Service Uptime	Application availability above 99% This includes Front End Website, ETLs, Databases, Servers, Cloud Services	Total Uptime / Total Time	99% Uptime * Azure Dependencies and Outages

Data Collection and CIDC Creation Process Questions

How is the CIDC created and where do I find the template?

See Universal Inventory Documentation

What is a SAM Product Family Name Type?

There are three different types of product family/version combinations within Intelligent Asset Manager (outlined below). The type is meant to identify what “type” of product family name/version is listed. There are certain product family names that can ONLY be used in the data collected as inventory and others that can ONLY be used for licensing. Within the CIDC, both the inventoried name and license product name (which needs to be filled in manually by the user creating the CIDC) is captured. Some product family names and versions may be used in both columns. The mapping between Product Family Name and Type can be found within sheets 2 and 3 of the *IAM_DomainData.xlsx* which can be downloaded from the “Product & Program Definitions” link on the footer of Intelligent Asset Manager.

SAM Product Family Name Type	Use Case
Both Inventory & License	Identifies that this Product Family/Version can be used in both the Inventory Product Family/Version columns AND the Licensing Product Family Name/Version columns within the CIDC.
License Only	Identifies that this Product Family/Version can only be used in the Licensing Product Family Name/Version columns within the CIDC.



Inventory Only	Identifies that this Product Family/Version can only be used in the Inventory Product Family/Version columns within the CIDC.
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How should SQL Core vs. Processor Licenses be reported in the CIDC?

When currently selecting SQL Server Enterprise and assigning the License model = Processor, I receive an error when uploading the CIDC.

Standard, Core, and Processor licenses are captured under separate SAM Product Family Names within Intelligent Asset Manager. To specify core or processor, the appropriate product family must be chosen when manually completing the CIDC. A full list of all available product families and mapping to the accepted License Models can be found on Sheet name "2" of Intelligent Asset Manager_DomainData.xlsx which can be downloaded from the "Product & Program Definitions" link on the footer of Intelligent Asset Manager.



SAMProductFamilyName	SAMProductFamilyNameType	Device	User	Process	Server + CAL	Core	User Access	Device Access	Host	MSDN	Windows Client Active
SQL Server - Standard	Both Inventory & License	1			1					1	
SQL Server - Standard 1 Processor	License Only			1							
SQL Server - Standard Core	License Only					1					
SQL Server - Standard RUNTIME	Both Inventory & License	1									
SQL Server - Standard RUNTIME 1 Processor	License Only			1							

Where can I locate the Product Mapping Excel spreadsheet that is helpful when creating a manual CIDC?

The "Product & Program Definitions" Excel spreadsheet can be found in the footer link of Intelligent Asset Manager.



Is information captured in Tab G of the CIDC cross checked against the information provided in the CIDC?

The information captured in this tab is populated at the discretion of the individual completing the CIDC form. It is not being cross checked against the data provided in tabs A-F of the CIDC for validation. However, if the fields are left blank a warning will appear in the generated EDP notifying the user that they should consider populating the tab for CIDC completeness.

Data Collectio Templates, Reports, and Privacy Questions

What is the Clean Inventory Data Contract (CIDC)?

The Clean Inventory Data Contract (CIDC) is an Excel report used as the required template to pull in and consolidate raw inventory data from the various inventory and discovery tools, de-duplicated and formatted to work with the main IAM site. Some manual usage and license allocation inputs will also be required to complete the CIDC. Once uploaded, the CIDC is validated against business rules to ensure proper data collection, and the Established



Deployment Position (EDP) and Effective License Position (ELP) reports are generated. If the CIDC fails validation the main IAM site generates the CIDC Error report detailing what needs to be fixed.

What is the Clean Inventory Data Contract (CIDC) Error Report?

The CIDC Error Report is an Excel spreadsheet outlining all errors contained in the CIDC that must be corrected before validation can be successful. If a CIDC fails validation, the CIDC Error Report can be downloaded from Intelligent Asset Manager Step 1 site by clicking the arrow in the status column next to the text “Validation Failed” and select “Download Error Report”.

License Product Family Name	Product Version Name	License Quantity	Active SA Request	License Program Group Assigned	License Model Assigned	Environment Type	External Connector	License Mobility	Product Type	Primary Resource	Notes	Error(s) Description
Windows Enterprise	10	1	0	VL	Windows Client Active	Production	0	0				
Windows Ultimate	7.0	1	0	ODM	Device	Production	0	0				
Windows Ultimate	7.0	1	0	ODM	Device	Production	0	0				
Windows Ultimate	7.0	1	0	ODM	Device	Production	0	0				License Model Assigned is Invalid Workspace Products & Programs Invalid Licensing Product Family One or more conditions has fail: 1. This product is a required field 2. This product should be Both 3. This product should be a Client Please check Workspace Product Product Family name: Invalid Licensing Product Version One or more conditions has fail: 1. This version is a required field 2. This version should match on Family Name, check Workspace
Windows Ultimate	7.0	1	0	ODM	Device	Production	0	0				
Windows Ultimate	7.0	1	0	ODM	Device	Production	0	0				

Can CIDC errors be corrected using the CIDC Error Report and if so, how?

Yes. The CIDC Error report contains inline error reporting and corrections can be made directly to CIDC Error Report and uploaded to Intelligent Asset Manager main site (Step 2) to generate an EDP. All of the cells containing an error are highlighted in red on each of the CIDC tabs. Scroll to the right to find a description of the error. Descriptions can be found in the furthest right hand column of each tab under the column named “Error(s) Description”. The data set within the error report is still protected with PII encryption and file level protection, both of which should be removed prior to making edits to the report.

To correct your CIDC using the CIDC Error Report: To correct your CIDC using the CIDC Error Report:

1. Remove all Excel password protection from this spreadsheet (if applicable).
2. Decrypt the error report using Encrypt and Decrypt option within Intelligent Asset Manager Companion App (WCA).
3. Take the necessary steps to correct all errors within the spreadsheet.
4. Encrypt using WCA.
5. Upload the corrected spreadsheet as a CIDC upload to Intelligent Asset Manager site.

What is the Established Deployment Position (EDP) report and how is it created?

The Established Deployment Position (EDP) is an Excel report generated by Intelligent Asset Manager, and is the output of the CIDC upload. It represents the full picture of the customer’s Microsoft product and technology deployments. This report is a more customer-friendly view of the data gathered in the CIDC.

What is an Effective License Position (ELP) and how is it created?

The Effective License Position (ELP) is an output from the EDP generated by Intelligent Asset Manager specific to SAM Engagements. The ELP maps licensing data from the Microsoft License Statement (MLS) and Other Data Report to deployment details in the EDP identifying licensing gaps and overages. Both the ELP and EDP are required for Proof of Execution (PoE) for SAM Engagements. Changes to the ELP were based on SAM Partner feedback to address technology changes such as Virtualization and Cloud computing. You will also note a set of new tabs and added information within the ELP, including a summary of license agreements pulled from the MLS and other licensing uploads (OEM, FPP, etc.). Deployment details captured in the CIDC will also be surfaced in the new ELP report through a set of new tabs.

**Why are there three views – Classic, Program, and Flat - available in the ELP?**

The ELP provides three high-level summaries of the Microsoft software deployment data mapped to license entitlement information from the MLS and Other Data Template. Depending upon the customer scenario or situation, one view may be more desirable for use by the SAM Partner during customer discussions. Within each of these worksheets, the colored columns may be expanded to find details on how the deployments are mapped to the various licensing programs and rights.

Please note: The MLS Volume Licenses column within the *ELP - Program View* will not be automatically populated in the top table of this view as the MLS does not split out effective license quantity by license program.

What is the source of information populated in the Summary tab of the ELP?

ELP Summary tab information is pulled from the Pre-engagement Customer Survey, Tab G of the CIDC, and account information from CRM. Fields that are not automatically populated are optional.

Why are both the EDP and ELP reports required as part of a SAM Engagement?

The EDP report and the ELP report were developed for unique purposes. The EDP report includes the complete inventory of Microsoft products, along with some usage and licensing data, which provides customers with rich data that they can use to optimize their infrastructure. Intelligent Asset Manager pulls relevant information from the EDP into the ELP template, which will be combined with other data provided by Microsoft and the customer, in order to identify under or over-licensed scenarios. Each new and separate deliverable will do a better job of collecting and presenting the respective data to the customer.

Why does finalizing the ELP require a second MLS in some cases?

ELPs being finalized within 60 days of the Engagement Proof of Execution (POE) date do not require a second MLS, however SAM Engagements lasting longer than 60 days do require an updated MLS uploaded to IAM to finalize the ELP. This updated MLS is an important component to create a complete and accurate ELP and reflects changes that have occurred during the course of the engagement.

What are the requirements of the Initial MLS Upload when creating a SAM engagement?

When a SAM engagement is created in Intelligent Asset Manager, an "initial" MLS is required. The uploaded MLS cannot have a calculation date that is more than 30 days before or after the engagements POE date. This requirement has been put in place to ensure that the final ELP contains an up to date set of licensing information for the customer. The initial MLS can only be used in the final ELP if the ELP is being finalized within 60 days of the POE date. These requirements ensure that the MLS used in a final ELP is no more than 90 days old.

Where do I find the MLS Calculation date?

This is located on the Organizational Summary tab of the MLS.



How can I request a second MLS?

SAM EMs may request an updated MLS on behalf of the SAM Partner. The MLS can be acquired in one of two ways: via the self-profile tool for less complex accounts, or through the Profiling Services team for a manually produced MLS for larger, more complex accounts.

What is the Other Data Spreadsheet?

The Other Data spreadsheet is a spreadsheet used during the creation of an Effective License Position (ELP) within Intelligent Asset Manager. It can be used to add new licenses (OEM, FPP, ISV, MPN, and Subscription Entitlements) not captured within the MLS or used to manage manual adjustments to the ELP (Manual MLS Adjustments, Deployment Adjustments, and Licensing Allocation Adjustments). ELPs are generated only after a MLS has been uploaded to the engagement. After the MLS has been uploaded the Other Data spreadsheet is used by IAM.

What are the types of adjustments handled within the Other Data Spreadsheet?

The Other Data Template can be used to update the ELP by adding new license entitlements that are not captured in the MLS or manually adjusting quantities associated with the MLS, Deployments, and Licensing Allocation.

Row Type	Use	ELP Column	Adjustment
OEM	Used to add OEM licenses to the ELP calculation. OEM licenses do not get captured within the MLS.	OEM Licenses	
FPP	Used to add FPP licenses that are not captured within the MLS	FPP Licenses	
ISV	Used to add ISV licenses to the ELP.	ISV Licenses	
MPN	Used to add MPN specific licensing that is not captured within the MLS	MPN Licenses	
MPSA	Used to add MPSA licenses to the ELP	Used to add MPSA licenses to the ELP.	
Subscription Entitlement	Used to add subscription entitlements that are missing from the MLS. (example: MPSA)	Subscription Entitlements (Non-MLS)	



Manual Adjustment	Manual Adjustments that need to be made to the licensing quantities within the MLS.	Manual MLS Adjustments
Deployment Adjustment	Manual adjustment to incorrect deployment quantities. This could be a result of incorrect EDP datasets after finalizing. The note field is required if a deployment adjustment is made.	Manual Deployment Adjustments
Licensing Allocation Adjustment	Manual Adjustment to the Licensing allocation quantities being calculated in the ELP.	Manual License Allocation Adjustments

What are System Generated License Allocations and how are these turned on or off in IAM?

After licenses from the MLS and/or Other data are directly allocated to deployments from the EDP, an additional set of license allocations are automatically applied during the creation of your ELP. The two SGLA rules being applied in the creation of the ELP are:

Downgrade Rights - Excess license quantities from the MLS and/or Other Data are applied to earlier versions of the same product. Version rankings can be found on Tab 3 of the Product & Program Definitions Sheet.

Cross Edition Rights – A subset of product families (Windows Server, SQL Server) have been grouped together to apply excess licenses from one edition to another (Enterprise covering Standard). These product groupings can be found in tab 3 of the Product & Program Definitions Sheet.

My customer has concerns regarding local laws governing data privacy and/or sovereignty. Can we still proceed with a SAM Engagements?

Microsoft is committed to customer data protection and privacy. The SAM Engagement does not require Microsoft to process any highly sensitive personal data, but it does require the transfer of encrypted PII to the United States for processing by Microsoft.

As part of our commitment, a Windows Personally Identifiable Information (PII) encryption application is provided to ensure that no unencrypted PII is transmitted to Microsoft, without the customer’s consent. The data processing that occurs in the context of the SAM program is only that which is necessary for the legitimate interests of Microsoft, the partner, and the customer. It is the responsibility of the customer and partner to determine if the engagement and data can be managed in a way that complies with local laws. Microsoft abides by current European data transfer requirements regarding the collection, use, and retention of data from the European Economic Area and Switzerland. All Microsoft Excel files generated by Intelligent Asset Manager have the option to be password protected using a password provided for the engagement during the CIDC upload. Only users who have the engagement password used to protect the file will be able to open and view files downloaded locally. As the customer’s trusted advisor, you will be able to view the identified sensitive data locally in order to provide the customer a complete engagement and solid recommendations based on the customer’s data. If the customer wishes, only they will have the ability to decrypt the data. This process has been reviewed by Microsoft’s global privacy team to safeguard that sensitive data will not be available to Microsoft.



How does the encryption process work?

Intelligent Asset Manager Companion App is available to download via a link on Intelligent Asset Manager to encrypt sensitive data (e.g. PII). Step 6 of Intelligent Asset Manager Companion App requires the PII within the CIDC to be encrypted prior to upload to Intelligent Asset Manager site.

Steps:

- Open the App and browse to a CIDC file using Windows Explorer
- Associate a strong password of the user’s choosing, with a minimum of 8 characters, to encrypt all PII fields within the CIDC file chosen. The password chosen will be used to decrypt at a later point in time. The user will then upload this file with encrypted PII to Intelligent Asset Manager using Intelligent Asset Manager workflow.
- If you currently use the Windows 8 Encryption App to encrypt CIDC data, this app must be used to decrypt data as well. Intelligent Asset Manager Companion app will not decrypt data originally encrypted using the Windows 8 Encryption app.

Please note: The strong password entered by the user will not be stored by either the Windows 8 Encryption App or Intelligent Asset Manager Companion App, nor transmitted outside of the Apps. It will be the user’s responsibility to securely store the password and file associations. If the password is lost or forgotten, IAM Support will not be able to restore the data.

If a customer wishes to provide Microsoft with the decrypted CIDC, EDP, or ELP report to facilitate compliance or IT optimization discussions, what is the process to share the decrypted PII?

Microsoft requires written consent directly from the customer before any decrypted PII is accepted. The SAM Engagement Manager will work with the customer to ensure all Microsoft policies and procedures are met for sharing and sending PII.

The EDP template contains customer information such as machine name and username. Why is Microsoft collecting this level of detail?

Microsoft and SAM Partners, through Intelligent Asset Manager, collect and utilize a variety of information to enable the goal of delivering a consistent, effective, and accurate SAM engagement. Personally Identifiable Information (PII) is encrypted by the Customer and/or Partner prior to uploading data into Intelligent Asset Manager.

Data such as machine name, user name and IP address is important to collect in order to provide a customer with a complete engagement and detailed, customer-specific recommendations. The collection and analysis of this data by the SAM Partner is critical to providing the customer with a value-based engagement. For more details, refer to the Software Asset Management (SAM) Engagement Data Usage and Privacy Information document.

What does Microsoft do with the info gathered in the EDP, who at Microsoft has access to the information, and how long does Microsoft keep the information?

At the conclusion of the SAM engagement, Established Deployment Position (EDP) data is transferred from Intelligent Asset Manager to a Microsoft data storage infrastructure and is retained indefinitely for internal purposes including but not limited to analysis and product planning; however no PII is transferred. All PII is removed prior to the transfer.

SAM Engagement data is then purged from Intelligent Asset Manager site 90 days after the close of the engagement.



Who is responsible for ensuring the accuracy of the data in Intelligent Asset Manager? If a mistake is made it could result in an incorrect order.

As the partner working with the customer, you are ultimately responsible for reviewing and ensuring completeness and accuracy of engagements, including all data entered into and reported out from Intelligent Asset Manager before it is provided to a customer. For additional information, please refer to Intelligent Asset Manager Terms and Conditions