

Software Asset Management

Software Asset Management Checklist

This list will help you keep track of each step. Check off each item as you complete them. Visit the "helpful links" for more information on each step.

1. Take an initial inventory of software installed.

Helpful links:

- Software Inventory and Asset Management Tools
<http://www.microsoft.com/resources/sam/sit>
- Microsoft Software Inventory Analyzer (MSIA)
<http://www.microsoft.com/msia>
- PC Software Inventory Report
http://www.microsoft.com/resources/sam/partnerguide/sales crt_templates.aspx

2. Track down existing licenses.

Helpful links:

- eOpen
<https://eopen.microsoft.com>
- Microsoft Volume Licensing Services
<https://licensing.microsoft.com>
- Microsoft SAM Licensing Documentation
http://www.microsoft.com/resources/sam/lal_doc.aspx
- Microsoft Licensing
<http://www.microsoft.com/licensing>
- How To Tell
<http://www.howtotell.com>

3. Organize and analyze results of the software inventory and license information.

Helpful link:

- Software and License Summary Report
http://www.microsoft.com/resources/sam/partnerguide/sales crt_templates.aspx

4. Determine whether additional licenses are needed and which licensing solution best fits your needs

Helpful links:

- Microsoft License Configurator
<http://members.microsoft.com/partner/licensing/licensingconfigurator>
- Microsoft Licensing
<http://www.microsoft.com/licensing>

5. Determine a central place to keep original media, licensing documents, and invoices.

6. Implement policies and procedures for software use.

Helpful link:

- SAM: Review Policies and Procedures
http://www.microsoft.com/resources/sam/howto_review.aspx

7. Use the information gathered from the previous steps to put an ongoing software asset management plan in place.